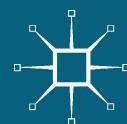


PALGRAVE
HANDBOOKS



THE PALGRAVE HANDBOOK OF AGE DIVERSITY AND WORK

Edited by Emma Parry
Jean McCarthy



**The Palgrave Handbook of Age Diversity
and Work**

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The Palgrave Handbook of Age Diversity and Work

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*For my parents, Angela and Trefor, whose obvious pride every time
I publish another book makes all the work worthwhile. Here you go Mum,
another one to show off to your friends!*

-EP

*For my parents, Anne and John, who inspire my perspective on successful
ageing, and my husband, Brian, my family, and friends for all of their
“advice and other stories.”*

-JMcC

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1

Introduction

Emma Parry and Jean McCarthy

Increasing longevity, driven by advances in human health and broad improvements to quality of life, is one of the greatest achievements of our time. The 2015 Revision of World Population Prospects states that life expectancy at birth is projected to rise from 70 years in 2010–2015, to 77 years in 2045–2050, and to 83 years in 2095–2100 (UN 2015: 6). This global triumph, however, creates unique challenges concerning both the economic and social structure of society, since the global population is ageing at a rate “without parallel in the history of humanity” (UN 2001: xxviii). Approximately one-quarter (26 per cent) of the world’s people are under 15 years of age, 62 per cent are aged 15–59 years, and 12 per cent are aged 60 or over (UN 2015: 1). The population aged 60 or over, which currently stands at 901 million, is the fastest growing—at a rate of 3.26 per cent per year. By 2050, all major areas of the world, except Africa, will have nearly a quarter or more of their populations aged 60 or over. Where future population dynamics are largely dependent on fertility rates, many countries are experiencing below-replacement fertility, and global fertility is projected to fall throughout the rest of this century. As such, the age

Respicere, Adspicere, Prospicere
[Examine the Past, Examine the Present, Examine the Future]

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structure of the global population is shifting from the traditional population pyramid towards the so-called “population dome” (The Economist 2014).

A transition towards a rapidly ageing, and therefore, age-diverse population is clearly afoot, placing intense pressure on healthcare and social services, and particularly on social security, given the imminent sharp increases in old-age dependency ratios. Dependency ratios measure the population aged over 65 as a percentage of the labour force, and the ratio for the world as a whole will reach 25.4 per cent by 2050, up from 11.7 per cent in 2010 (UN 2013). This projected dramatic increase in dependency means that there will be a massive reduction in the number of people working. As such, population ageing has been identified as one of the “Grand Challenges of the 21st Century” (U.S. Office of Science and Technology Policy 2014) and incorporated into the United Nation’s 2030 Agenda for Sustainable Development because it brings with it a rapidly ageing workforce.

The ageing of the workforce has been described as *the* defining social issue of this century (Pitt-Catsouphes 2007). Changing demographic landscapes expose the impending loss of the “baby boom” generation from the workforce as they reach their 60s and 70s over the coming years. At the same time, decreasing birth rates will likely lead to labour shortages of younger workers. Indeed, fewer younger workers are entering the labour market than ever before. These problems are exacerbated by: (1) the reluctance of many organisations to develop, promote, or retain older workers (see, e.g., McCarthy et al. 2014); and (2) current levels of youth unemployment (see, e.g., Kapsos 2013). It is also recognised that both younger and older workers continue to find it difficult to access employment and re-employment opportunities in the aftermath of the Global Financial Crisis (ILO 2015). Combined, the consequences of such phenomena include heightened long-term pressure on national social security and pension systems further expedited by insufficient replacement rates, as well as problems associated with experience and knowledge loss across organisations. This has prompted both a public and an organisational policy orientation towards promoting an increasingly *age-diverse* workplace.

Understanding and managing an age-diverse workforce, therefore, are now critical issues for leaders, policymakers, and organisational decision makers worldwide, in addition to those engaged in age-related research across the disciplines of, *inter alia*, Management and Behavioural Sciences, Economics, Psychology, Sociology, Health, Engineering, and of course, Gerontology. Public bodies and policymakers are concerned with increasing the labour market participation of “older” (and “younger”) workers to ensure a sufficient labour supply and to support economic growth over the coming decades.

Organisations are concerned about talent shortages, the strategic retention of human capital, occupational health, as well as the growing number of age discrimination law suits. Individuals are anxious about quality of life and financial security as they age. Researchers are interested in finding evidence-based solutions to these issues. This has resulted in a proliferation of material—across various media sources and in academia—that centres on age in the workplace. Yet, despite this burgeoning discourse at all levels, there remains much to be understood about age diversity and work.

While the importance of addressing age diversity is generally accepted, policies and practices directed at creating and maintaining work environments which support older workers, improve opportunities for younger workers, and craft holistic approaches to facilitating age diversity have been slow to develop. For example, a review of the evidence base on managing older workers that one of us completed five years ago (Parry and Harris 2011) showed little progress in this area over the previous ten years. Age-bias interventions used within Human Resource (and Diversity) Management practice have long been criticised for being little more than surface level “box-ticking”, or for placing an emphasis on “older” workers and neglecting “younger”, or indeed, “mid-life” workers, rather than dealing with the age structure of the workforce as a whole.

Scholarly contributions regarding age diversity have grown, but the field has become increasingly fragmented, with a number of separate streams of age- and work-related research emerging. For example, from a disciplinary perspective, research has been undertaken within Psychology, Sociology, Health, and Economics, to name a few, but rather than building an interdisciplinary knowledge base, the research from these disciplines is rarely synthesised. In addition, over the past decade, the field of generational diversity has blossomed, with a large amount of attention being paid to the differences in values, attitudes, preferences, and expectations at work among generational cohorts. This differs from work which explores changes in people’s attitudes and values as they age. It focuses instead on when an individual is born, with the premise that a person’s experiences in their formative years lead them to develop values and attitudes which remain stable over their lifespan. Again, despite criticisms that empirical research has failed to distinguish between differences due to age and generation, knowledge in these areas has mostly remained separated, with few attempts to bring these literatures together.

These are all the reasons why we welcomed this opportunity to develop a comprehensive treatise focused on explicating age-related issues at work. In doing so, we attempted to bring together knowledge from different disciplines

and approaches to investigating age diversity at work in order to contribute to a more complete and integrated understanding of this important issue. We reached out to subject matter experts who had a long history of publishing impactful research within a multitude of disciplines, as well as emerging scholars at the vanguard of their various research streams. We called upon them to synthesise previous research, to advance new conceptual, theoretical, empirical, and methodological knowledge, and to provide sound recommendations for future work. These efforts resulted in a Handbook that reflects the current state of knowledge in the field from a number of disciplinary perspectives, highlighting both overlaps and weaknesses in the extant evidence base, with a focus on taking the field forward. However, this book is not intended to provide all of the answers to the issues inherent in managing an age-diverse workforce; rather, it will allow readers to understand what is known, and thus what is not known, within this field. Contributions look to the past, to the present, and to the future in order to frame a better understanding of age diversity at work and to set a new agenda for research, policy, and practice focused on promoting a fruitful, age-diverse workplace.

The Structure of the Handbook

In structuring this Handbook, we focused on six broad areas. The first section examines different disciplinary perspectives on age, ageing, and age diversity, at work. Second, we present a number of chapters that focus on important issues related to older workers, while the third section centres on younger workers. To date, most texts have focused on either older or younger workers; here we bring this research together in one Handbook to allow readers to consider the issues faced by both groups simultaneously. Our fourth section examines ageist attitudes, particularly with respect to age stereotyping and discrimination, while our fifth section provides a discussion on various contextual aspects of age diversity at work. Finally, we include a detailed consideration of different workplace interventions directed at managing age diversity. We have organised the book in this way in order to add some structure to the field and to make it easier for our readers to locate particular topics. However, we recognise that these distinctions between topics are somewhat artificial and that, actually, these areas are interrelated. We therefore urge readers to recognise the overlaps between sections and to consider how the knowledge developed in one area might inform the others. We now consider the content of each of these sections in more detail.

Part 1: Perspectives on Age, Ageing, and Age Diversity

In this first section, we present a number of chapters that adopt a different approach to examining age, ageing, and age diversity. This includes chapters that discuss different conceptualisations of age itself and also those which examine age diversity using different disciplinary lenses. It was important to us in this Handbook to move away from considering age only as a chronological construct and to recognise the multitude of disciplines in which age diversity research is based in order to produce a holistic analysis of the field.

In Chap. 2, Cleveland and Hanscom consider how age is conceptualised and defined, and argue that one's chronological age (age in birth years) is just one factor in determining our perceptions of age in the workplace. They provide a targeted review of the age and ageing literatures that cut across a number of disciplines, including gerontology, biological and cognitive ageing, lifespan ageing, and work psychology. Reviewing a number of theories of ageing within these disciplines that underlie measures of age, they determine how age manifests itself within the context of work. They discuss multidimensional measures of subjective age (as opposed to chronological age), awareness of age-related changes, and the concept of "successful ageing" as important in moving the field in a positive direction both in terms of theory and our understanding of the linkages between "what is old" and important work and well-being outcomes.

In Chap. 3, Ulrick explores the concept of "age identity", arguing that much of the extant literature has neglected to consider the influence of age identity in the work context. Through a thorough review of the literature, he presents a conceptual model demonstrating the influence that various conceptualisations of age and ageing have on age stereotypes, age labels, and the formation of age identity, and its subsequent impact on important work-related outcomes. This chapter advocates for engagement with the concept of age identity by discussing potential implications for both research and practice.

In Chap. 4, Dikkers, de Lange, and van der Heijden focus on the concept of "successful ageing" at work from a psychological perspective. They conceptualise successful ageing (and active ageing) within an organisational context and review psychological theories that explain differences in age-related functioning across time. Drawing this literature together, their discussion emphasises the importance of creating and maintaining an engaged, healthy, and productive workforce as the population ages, and consequently, they propose a number of human resource (HR) policies and practices that can facilitate sustainable careers across the lifespan.

Chapter 5, by Urwin and Parry, presents an approach to examining age effects on the labour market using Economics. Urwin and Parry utilise a number of large-scale datasets which focus on elements of labour market activity and conclude that there is a rise in the proportion of individuals who are beyond usual retirement age, and that this increase may be accompanied by a rise in economic activity rates.

Hales and Riach, in Chap. 6, present a sociological account of age, ageing, and age diversity at work as contextually embedded phenomena configured by various cultural, social, political, and historical circuits that are used to shape people's meaning of age and ageing. This chapter presents a conceptualisation of ageing as a phenomenon that is experienced, negotiated, and accomplished, rather than one which is objectively measured and encountered. They introduce the concept of "embedded ageing" and discuss organisational examples relevant to the organisation of ageing, suggesting how an embedded ageing approach may serve to reorientate the way we consider ageing in an organisational context.

In Chap. 7, Fitzgerald et al. offer a critical discussion on ageing and older workers from a health perspective, advocating the inclusion of gerontological research in framing evidence-based interventions for managing an ageing workforce. This chapter places an emphasis on better understanding actual (rather than perceived) biological and psychological age-related changes that influence the work environment for older workers, through a comprehensive review of this literature. They discuss how workforce ageing can be better managed from a health practitioner's perspective.

Part 2: Older Workers

In this section, we bring together a number of different avenues of research relating to the older segment of the workforce. There has been an explosion of interest in issues relating to managing older workers over the past few years as scholars and practitioners alike have become aware of the need to better understand this group. We not only discuss the effects of being older at work but also examine different aspects of work in later life, including volunteering and self-employment, and bridge employment, before finally considering retirement and retirement planning.

In Chap. 8, Potočnik explores healthy ageing and well-being at work, since previous research has not yet provided unequivocal conclusions regarding how ageing affects employee well-being. As such, this chapter integrates the existing evidence around the age effects on psychological and subjective well-being

among older employees, and then analyses different underlying mechanisms and protective factors implicated in the age–well-being relationship in order to shed more light on how healthy ageing at work can be achieved. The chapter concludes with a set of practical recommendations for individuals, organisations, and policymakers on framing a healthy workplace for all employees as they age.

In Chap. 9, Pitt-Catsouphes, McNamara, James, and Halvorsen consider two compelling questions related to older workers: What do older adults want to do in this stage of life? How can older adults remain actively engaged as contributing members of society? Specifically, they focus on volunteerism and entrepreneurship/self-employment, two types of productive activities that can both be personally meaningful to older adults and also have the potential to contribute in some way to the society at large. Drawing on two nationally representative data sets from the USA: the Current Population Survey (CPS) and the Health and Retirement Study (HRS), they find that being a volunteer is positively associated with indicators of well-being for older adults. Further, and despite the job-related demands that can accompany self-employment, they find that self-employed older adults are not at increased risk with regard to their well-being. They discuss the important implications that these behavioural shifts towards productive ageing have for the life experiences of older adults, as well as for practice, policy, and future research.

In Chap. 10, Alcover discusses the changing nature of careers in relation to older workers, with a particular focus on exploring the concept of “bridge employment”. This chapter, therefore, first reviews recent literature in order to conceptualise and characterise bridge employment before offering a synthesis of antecedents and consequences of bridge employment decisions, highlighting the main benefits for individuals, organisations, and societies as a whole. This chapter proposes a new look at bridge employment—namely, conceptualising mature and older workers engaged in bridge employment as “job crafters”, who are actively engaged in meaningful work in the later years of their career. The chapter concludes with recommendations for both practice and research from this perspective.

Damman, in Chap. 11, moves to considering the transition out of work and into retirement for older workers, using a life history lens. Recognising that retirement research is a broad and interdisciplinary field of study, Damman argues much of this research has, to a large extent, focused on explanatory factors that are relatively close in time to the retirement outcomes studied, such as the health, wealth, work, and family situation of older individuals. Damman, however, considers how more recent research within social gerontology has increasingly started paying attention to the role of experiences

earlier in the life course for understanding retirement transitions. The remainder of the chapter centres on earlier life experiences for explaining retirement-related decisions.

In Chap. 12, Chiva discusses the changing nature of life and work trajectories, and considers how individualised life and retirement planning can be used as an intervention for older workers in organisations. He proposes a novel, step-by-step approach to life planning that practitioners can use to help older workers navigate the implications of these more complex life trajectories in order to adequately prepare for their transition into retirement, while still in employment.

Part 3: Younger Workers

Section 3 focuses on the opposite end of the workforce to section 2, that of younger workers. Previous texts on ageing and age diversity have largely neglected this segment of the workforce, focusing instead on older workers. Recently, we have seen an increasing interest in the younger age cohort, emerging largely out of the concept of generational differences and the need to attract and retain this relatively small group of workers. Here we present work that uses two different approaches to examining younger workers—a generational approach and a labour market focus.

In Chap. 13, Ng, Lyons, and Schweitzer provide an overview of the Millennial generation, and examine the social and economic conditions they face as they launch their careers and proceed through their early career stage. They describe Millennials as today's young workers, within the context of their place in the birth cohorts or generations, review empirical evidence with respect to their attitudes, work values, and career expectations, and discuss the labour market challenges currently faced by this cohort of workers. They conclude with a discussion of the prospects and prescriptions for managing the Millennial workforce.

Murphy and Simms, in Chap. 14, use an industrial and labour relations lens to examine precarious employment in Europe, and present an overview of state, trade union, and employer responses to the labour market problems faced by the young worker *precariat*. They argue that collective actors have an often under-examined role in developing institutional responses to economic and social problems such as this. Finally, they offer a critical examination of the progress that has been made in this regard, and the extent to which there is scope to develop a more encompassing approach to addressing the young worker crisis.

Alonso and Fernandez continue Murphy and Simm's discussion in Chap. 15, and argue that there is little research on how the current situation of younger workers shapes their attitudes and perceptions of the labour market, and their possible life trajectories. Alonso and Fernandez attempt to unwrap those attitudes and perceptions, where they focus on the issue of younger worker discourses, using an example of one specific study on younger workers in Spain. They conclude with important considerations for policymakers and practitioners.

Part 4: Ageist Attitudes

In this section, we move on to summarise the considerable work that has been conducted in the area of age stereotypes and ageism. This is perhaps one of the more mature streams of work in the field of age diversity, with authors building on previous work and theories on age bias to develop this field. It would therefore be remiss of us not to provide an up-to-date (at the time of publication) discussion of this literature.

McCarthy and Heraty (Chap. 16) begin this section with a comprehensive review of age-related attitudes. They examine the distinct, but related, literatures on both attitudes and ageism, with a focus on explicating the tripartite nature of ageist attitudes: age stereotypes, affect, and discriminatory predispositions. They argue that much of the research on ageist attitudes to date has focused almost exclusively on age stereotypes, neglecting to consider the emotional and behavioural aspects of ageist attitudes. They further explore theoretical perspectives on the determinants of ageist attitudes at work. They state that it is only when we unearth a real, comprehensive understanding about how ageist attitudes are formed, and what forms these attitudes take within organisations, that we can begin to advance real solutions and interventions to reduce the incidence of ageist attitudes in the workplace. They conclude with a number of specific recommendations for future work in this area.

In Chap. 17, Nadler, Morr, and Naumann focus their discussion on ageist attitudes as they impact younger workers in the USA. In doing so, they explore current ageism laws both in the USA and around the world, discussing stereotypes and ways to change them, outlining stereotypes concerning Millennials, describing generational research on Millennials and Generation Z, and highlighting issues concerning ageism laws in the USA.

In Chap. 18, Truxillo, Fraccaroli, Yaldiz, and Zaniboni review the issues surrounding workplace age stereotyping and discrimination, particularly as they relate to older workers. They begin by differentiating age stereotyping from discrimination and by discussing which age groups are considered

(e.g., who is “old”) when assessing age discrimination. They then examine the extant theoretical explanations for age stereotyping and discrimination, followed by the ways in which age discrimination can play out in the workplace and the empirical work on it. They follow with an examination of when age discrimination is likely to occur and then conclude with a discussion of developing areas of research in this active field.

Part 5: Age Diversity in Different Contexts

In our fifth section, we move away from the examination of age diversity in isolation to consider how different elements of the context might affect age diversity or the approach to managing age diversity, or how other characteristics of the individual might interact with age to disadvantage or advantage individuals. Too often, we look at single characteristics of the individual, such as age, without recognition that the influence of such characteristics does not occur in a vacuum, and that age might have different effects, depending on the context and other individual differences.

Our first chapter in this section (Chap. 19), by Lain, examines the importance of the policy context in the employment of people over 65. Specifically, Lain explains how contextual factors such as pensions and other financial incentives, and employment rights such as the existence of mandatory retirement might affect employment rates in older workers. Lain notes that policy changes, such as the removal of a fixed retirement age and the resulting increase in the numbers of people working past 65 years old, have implications in relation to the need to manage older workers effectively, particularly in relation to performance management and retirement pathways.

In Chap. 20, Flynn, Schroder, and Chan also consider the impact of the policy context on the employment of older workers but provide a specific comparison of the impact of the national context in the UK and Japan on age management and age diversity. Flynn et al. consider the institutional context in each country, specifically examining welfare provision and steps to ensure universal pension coverage. They then move on to look at the initiatives within each country for promoting age diversity. Flynn et al. conclude that the two nations are similar in that they have placed the responsibility for saving for longer retirements on the individual rather than on employers, and that cross-country comparisons are useful practically as they can lend themselves to more informative public policy-making.

Chapter 21, by Papavasileiou, moves away from the focus on public policy around extending working life and draws on generational theory to

examine the existence of different generations in Greece. This chapter is important as it establishes the need for specific generations to be identified in national contexts outside of the Western context, in which most generational research has taken place. Papavasileiou draws on the history of Greece to conceptually define the generational structure within the country and emphasises the importance of national culture in the formation of generations.

Chapter 22, by Nickson and Baum, provides an interesting examination of the relationship between age and a focus on aesthetic labour, noting that in customer-facing industries such as hospitality and retail that have an emphasis on the appearance of their employees, there appears to be a focus on being young. Nickson and Baum note that there appears to be evidence of companies employing workers of particular ages in order to support their brand image, but note that more research is needed to examine potential unconscious bias within these industries when hiring workers.

In Chap. 23, Murphy and Cross look at the intersection between age and another diversity characteristic—gender. Murphy and Cross draw on the theories of intersectionality and cumulative inequality theory in order to examine the potential disadvantage faced by women of particular ages in the labour market. In particular, the chapter considers the role that gender plays at different stages in an individual's life and careers, and thus, the potential dual interaction of age and gender. Murphy and Cross conclude that the intersection of age and gender creates a dual disadvantage for women and consider the implications of this for policymakers and employers.

Part 6: Managing an Age-Diverse Workforce

In this section, we move away from our examination of conceptual, theoretical, and empirical research about age diversity itself, and focus instead on those interventions which can enable employers to manage an age-diverse workforce effectively. Rather than including a single chapter on this subject, which is the norm for similar texts, we have chosen here to identify a number of different areas of intervention and provide a comprehensive analysis of each from experts in the field. This means that we have been able to employ scholars in the fields of human resource management (HRM), recruitment and selection, training and development, careers, the psychological contract, and leadership to consider these areas in depth. We have done this in order to allow practitioners and academics to consider the means of managing age diversity in some detail.

Our first chapter in this section (Chap. 24), by Conway and Monks, provides a useful overview of how HRM policies and practices might be tailored to different segments of an age-diverse workforce. Drawing on ageing, generational, and life-stage perspectives, this chapter considers how work-related motives might be different across the workforce and how these might affect the requirements of an HRM system. Concluding importantly that work motivation across age groups does not differ in relation to the amount of motivation but that different elements of an HRM system might be more effective at motivating the different age groups, Conway and Monks emphasise the importance of a varied approach to HRM. This chapter also notes that research into HR and age diversity is in its infancy, so more work is needed to establish how reactions to HR systems differ by age.

Chapter 25 begins our focus on specific areas of managing an age-diverse workforce. In this chapter, Rudolph, Toomey and Baltes consider the decision points within recruitment and selection and their impact on age diversity at work. This discussion is particularly important, given the difficulty that both younger workers and those who are over 50 have in moving from being unemployed to employed. Rudolph et al. first examine the impact of age stereotypes and discrimination on recruitment and selection, before discussing how age management principles can be used in the design of recruitment and selection processes. Specifically, this chapter examines age-conscious approaches to recruiting and selection, recruiting presence and image, targeting non-traditional workers and entry-level applicants, internal recruitment, job analysis, biographical data, training and experience evaluations and structured selection interviews in order to provide some useful insights for both scholars and practitioners with an interest in recruitment and selection.

In Chap. 26, Kraiger moves our focus onto training and development, considering first how requirements for training might develop as people age due to skills obsolescence and cognitive changes. Kraiger then examines the implications of these changes for training design, presenting the debate on whether employers should use age-specific or age general training, before considering a number of elements of both pre-training and training delivery in some detail. Kraiger concludes that evidence on the effectiveness of training interventions is limited but that training principles that maximise learning regardless of training age, coupled with several specific training practices, should be particularly effective for older learners.

Chapter 27, by Lub, De Luiter, and Bloome, focuses on the psychological contract. Taking both ageing and generational perspectives, Lub et al. use a systematic review of the literature to examine age differences in psychological contracts. The authors conclude that transactional obligations become less

important as people age, and that the negative relationships between psychological contract breach and negative affect, trust, and affective commitment are stronger for younger workers. They also suggest that more research is needed that brings ageing and generational approaches together and considers interactions between the two, as well as research from geographical regions other than Europe.

In Chap. 28, we move on to look at career management within an age-diverse workforce. In this chapter, Fasbender and Deller first draw on career stage theories to examine career management over the lifespan. Second, the authors focus on individual career management, developing a process for career self-management and examining the antecedents of individual career management. Third, the chapter looks at organisational career management and the ways in which age-related differences might impact on an individual's career management needs, before identifying a range of career management strategies and practices that can address age-diverse requirements. Fasbender and Deller provide detailed directions for future research, including a required emphasis on the later stages of career development and differentiation between different occupations and industries.

Chapter 29, the final chapter in this section, focuses on leadership. The authors, Hammond, Lester, Clapp-Smith, and Palanski, examine the impact of age on leadership from two perspectives. First, they discuss the issues related to leading an age-diverse workforce. Second, they look at the development of leadership qualities over the lifespan, focusing specifically on knowledge, skills, abilities and values, personal identity, and wisdom. Hammond et al. conclude that more longitudinal research is needed to examine the extent of the decline of leadership behaviours and the nature of the shift in leadership motivations, as well as to establish the trajectory of leader development through the lifespan, so that the intersection between leadership and ageing can be better understood.

Given the diversity of perspectives and approaches that these chapters provide, we hope that this Handbook will encourage readers to move out of the silos in which we so often operate. If anything, this text highlights the fragmented nature of the field and the need for significant future research. This Handbook acts as a call for the scholars undertaking this research to bring together different theoretical lenses, academic disciplines, and methodological approaches in order to develop a more mature understanding of age diversity at work. Similarly, for practitioners, it is important to draw on multiple perspectives when considering different age segments of the workforce and to develop interventions that are based on the entirety of the evidence base, rather than only on one discipline.

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Part I

Perspectives on Age, Ageing, and Age Diversity

2

What Is Old at Work? Moving Past Chronological Age

Jeanette N. Cleveland and Madison Hanscom

What is your age? How old or young do you feel? How old or young are you in relation to your peers, co-workers, or supervisor? At what age, or stage, does older age begin? From the time we can talk, our age is a salient personal characteristic with significant ramifications for others and ourselves in school, at work, socially, and at home. According to one of the broadest surveys gauging US views on ageing, the older people become, the younger (relative to their chronological age) they feel and the more likely they perceive “old age” as starting later in life (Taylor 2009). Similar results were found using a Japanese sample, again demonstrating that individuals report feeling subjectively younger than their chronological age (Hatta et al. 2010). In fact, Barak (2009) found subjective age to consistently be younger than chronological age across 18 different countries. Importantly, not only does there appear to be a gap between actual chronological age and the age people feel, this gap between chronological age and felt age increases with one’s age. Therefore, one’s chronological age is just one factor in determining our perceptions of age.

With the ageing global population, ageing workforce, and an increase in retirement age in both the USA and Europe, there is an increasing need to more fully understand the facets of age, especially within contexts most

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salient to the majority of people (including work, family, social, and health). Therefore, in the present chapter, we conduct a targeted review of the age and ageing literatures that cut across a number of disciplines, including gerontology, biological and cognitive ageing, lifespan ageing, and work psychology. Drawing from these literatures, we begin this chapter by briefly reviewing a number of theories of ageing that underlie measures of age. Next, we identify a number of ways that age has been conceptualised and measured. Recently, much discussion has focused upon the multitude of context-dependent age measures and conceptualisations, with little theoretical development, guidance, or evidence that the propagation of so many measures adds unique value to our understanding of what it means to “age” or be older. In the third section of this chapter, we turn to the work literature to determine how age manifests itself within the context of work and its linkages with important performance and attitudes outcomes. In the fourth section, we discuss three age-related constructs that we believe will move the field in a positive direction both in terms of theory and our understanding of linkages among “what is old” and important work and well-being outcomes.

Why Is Age Important to Study?

Life expectancies are increasing, and with the global economic downturn in 2007, many middle-aged and older adults choose to remain in the workforce. Further, these workers are often the ones who carry both the responsibilities of eldercare for 80+ year-old parents, while at the same time, their college-graduate adult children are returning home to reside due to the scarcity of jobs. Middle-aged and older working adults plan to remain in the workforce because of concerns regarding retirement income, healthcare benefits, and/or continued desire to remain active and socially engaged (Sterns 2010). Further, changes in social security or retirement benefits in the USA and Europe encourage continued work (Meister and Willyerd 2010; Phillips and Siu 2012).

Ageing Is a Global Issue

Global ageing is occurring, yet the patterns across nations vary (Philips and Siu 2012). The more developed nations are typically the ones that are demographically the oldest. They include Europe, Japan, and much of East Asia. Further, many of these demographically older countries are either currently or potentially experiencing some labour shortages (Kinsella and Wan 2009).

Growth of older population patterns varies across countries—some with relatively steady growth and others more explosive. While steady ageing trends have occurred in developed countries such as the USA, the majority (over 60 percent) of adults of age 65 and more live in developing nations (Kinsella and Wan 2009). For example, China has more people aged 65 and over than all the major countries of Western Europe combined as of 2010 (Phillips and Siu 2012).

It is important to understand the notion of age or what is “old” because it affects younger people and workers as well as middle-aged and older individuals in a number of ways. First, for example, the oldest of old (over 85 years) (National Institute on Aging 2011) are projected to increase 351 percent between 2010 and 2050, compared to a 22 percent increase for those 65 and younger. This is a key group even though they are not represented in the workplace. They are critical because this is the group that, on average, will have the highest levels of disability and dementia. This growing proportion of individuals will likely require a significant and disproportionate amount of social and long-term care, and they are likely to consume substantial health-care resources. Second, this population may also provide a source of job growth in healthcare and service occupations. Further, middle-age or younger potential employees may opt out of the workforce to care for the elderly at home. Third, it is the fastest growing portion of the total population in many countries.

As Phillips and Siu (2012) note, diversity is the key characteristic of the ageing population. There is increasing feminisation of the older population, especially among the oldest of old, with women representing well over half and often two-thirds of this group. Older women will continue to outnumber men (Bloom et al. 2010). Finally, “older” countries such as Italy with high proportions of older people may see a confluence of factors that speed up the ageing cycle. That is, the combination of increased longevity together with falling birth rates is likely to shift the age pyramid to reflect increasingly top heavy older groups with an increasingly weaker or narrow younger base (Phillips and Siu 2012). The rate at which this occurs may depend, in part, on the extent to which younger populations migrate to other workforces/countries, leaving primarily older people behind in some regions.

By understanding the factors that precede, influence, and shape one’s age, we may be able to more accurately identify where to devote organisational resources to maximise both employee longevity in workplace productivity and positive work attitudes as well as employee health and well-being. Importantly, such knowledge would allow both organisations and industries dealing with the aged to address and possibly mitigate the antecedents associated with “old age” for future generations.

Theories of Age

The theories described briefly below address different aspects of ageing and can complement each other to explain the ageing phenomenon. Experts on ageing generally agree that no single theory can adequately explain the full spectrum of the ageing process (Bengston et al. 1999). Although there is not a unified theory, the theories can be grouped roughly into four categories (Baltes et al. 2012): (1) biological and stress theories; (2) cognitive theories, especially those drawing from the gerontological literature; (3) psychological and social psychological theories, also tapping social and lifespan gerontology; and (4) social and sociological theories. Each of these theories focuses on different levels of change (e.g., cellular changes, social, resources) and on specific processes (e.g., skeletal, information process). Further, some theories contend that ageing is entirely an external process dependent on life's surroundings, while others contend that ageing happens to an organism regardless of the environment.

Biological and Stress Theories

There are at least three categories within this literature: (1) stochastic; (2) programmed/development-genetic theories; and (3) biodemography and biopsychosocial.

Stochastic Theories of Ageing

This first category, stochastic, focuses on the internal and external factors that wear and tear upon the body and cause random damage. Some examples of theories within this group are DNA damage, free radical damage, and stress theories. DNA damage refers to the build-up of mistakes involved with cellular division and environmental influences over time that impede normal healthy functioning later in life (Friedrich 2001). Free radical damage theory is more interested in the cellular waste that accumulates to impair functioning later in life (Harman 1956). These are aligned with wear-and-tear theories. Stress theories focus on the biological damage done through the neuroendocrine system (e.g., exposure to stress-related hormones).

Programmed Theories

The second category of biological and stress theories refer to the ageing process as an internal function that is based on a plan. Programmed theory focuses

on genetic and developmental regulators as a set plan of ageing. Some examples of theories in this area are time-clock theory, cellular ageing (i.e., telomeres), ageing-immune system, evolutionary, and order-to-disorder theory. The time-clock theory focuses on how cells can only divide a certain amount of time (Hayflick 1994). Immune theory posits that the immune system can only maintain its efficiency for a certain amount of time before its decline (Hayflick 1994).

Biodemography and Biopsychosocial

Within this theoretical area of research that integrates biological and demographical components to understand ageing rates in populations, two branches of theories are studied. These can be referred to as the “why” and “what” theories. The *why* theories explain why humans and animals age. They might try to answer the question, “why do some species, subpopulations, or societies age faster than others?” (Vasunilashorn and Crimmins 2009). Human populations are studied across populations and also alongside other species. This branch is closely related to programmed biological theories as we discussed above—that ageing is regulated with a plan. These researchers are often interested in genetic and evolutionary influences and how these interact with time and the environment. The *who* theories investigate which populations age more quickly than others and which individuals die sooner than others (Vasunilashorn and Crimmins 2009). Researchers in this area employ a biopsychosocial approach, as we describe below, to thoroughly examine the changing rate of ageing. Using this approach, they can best identify individuals who are most at risk of negative health outcomes (Bengtson et al. 2009). Within the *why* theory branch of biodemography, researchers are highly concerned with explaining the health differences, stress levels and impact, other biomarkers, and environmental differences that contribute to the disparities between populations.

Like biodemography, biopsychosocial theories of ageing are the combination of multiple disciplines. According to these theories of age, there is no single cause of ageing: factors from biological, psychological, and social structural influences must be considered fully. The biological influences include those such as the immune system, cell deterioration from replication, degenerative change from both inside and outside of the organism, stress, and much more. Psychological factors include individual differences such as personality, wants and needs, mental health, attitudes, and so on. Social structural influences include variables, such as gender or socioeconomic status, that alter one’s surrounding environment as it pertains to the social context.

An individual's location in the social structure (e.g., race, education, culture) determines the resources they will be allocated, their behavioural expectations, normative guidelines, and ultimately their likelihood for healthy ageing (Ryff and Singer 2009). By connecting each of these fields of study into this multidisciplinary theory, the study of ageing benefits from examining interactions from factors that are all influential in determining one's experience throughout older adulthood.

Theories of Cognition

Theories of cognition are used to examine the mental processes throughout ageing. Although there are several theories within the cognitive perspective, most focus on the links between age and intelligence (Baltes et al. 2012). The dual-component theory of intelligence (Horn and Stankov 1982) distinguishes between fluid and crystallised intelligence. Fluid intelligence which is influenced by biological and genetic factors is believed to increase with age into one's 20s and may begin to decline as early as one's 30s (as shown in cross-sectional research) although longitudinal research suggests that the decline may not begin until one's 60s (Schaie 1996). Fluid intelligence reflects working memory capacity, the ability to think and reason, executive functioning (frontal lobe functioning), processing speed, and episodic memory. This is considered to be somewhat independent from knowledge and education.

Crystallised intelligence is the ability to use the skills, knowledge, and experience that one has accumulated over one's life and thus is influenced by experience and culture-based knowledge. Crystallised intelligence increases until older ages during one's forties; further, age-related declines begin to occur in our 60s according to longitudinal research (Baltes et al. 2005). Further, there are several cognitive components associated with fluid and crystallised intelligence, and each is affected by age differently. For example, effortful processing occurs when an individual requires substantial mental resources, such as when actively searching through their memory to remember something. This cognitive component declines with age. Automatic processing, on the other hand, does not require this cognitive capacity and can be drawn from quickly because of repeated experience with something, such as riding a bike. This cognitive component does not decrease with age. In fact, certain aspects of this component (e.g., vocabulary) have been shown to increase with age (McCabe et al. 2010). According to Baltes et al. (2012), most cognitive theories have focused on trying to account for the decline in fluid intelligence.

Schaie's Stage Model of Cognitive/Intellectual Development illustrates how people use cognitive abilities throughout life (Schaie 1977). Schaie originally proposed four stages of development: (1) the *acquisitive stage*, where people try to accumulate knowledge and experiences to be functional in society (childhood/adolescence), (2) the *achieving stage*, (young adulthood) where people focus on applying knowledge they gained in the previous stage, (3) the *responsible/executive stage*, where people use experiences and skills to take on responsibilities and take care of others (middle adulthood), and (4) the *reintegrative stage*, (older adulthood) where people become selective with their cognitive resources to focus on what matters to them. Later, a fifth and sixth stage were added to fully explicate the intricacy of the later stages of life (Schaie and Willis 2000): (5) the re-organisational stage describes the process of planning for retirement and a transition in the way of living (e.g., eventually becoming less independent) and the (6) legacy-leaving stage to cognitively prepare for death and reflect on life (e.g., create a will, write an autobiography). The legacy-leaving stage can overlap or follow the re-organisational stage.

Speed of processing is a topic of great importance within this field. A leading pioneer within this subject, Timothy Salthouse (1996, 1999) has illustrated an accepted reasoning for an observed difference in cognitive ability between the young and old and has attributed it to speed of processing. Older individuals generally process information at a slower rate than those who are younger.

Gerontological and Psychological Theories of Age

Both gerontological and psychological theories focus on a wide range of topics that often reflect collaboration across sub-disciplines of psychology, including clinical, physiological, cognitive, and social psychology to examine ageing from a psychological perspective.

Lifespan Development Perspective of Ageing

The lifespan development perspective of ageing theory is concerned with the development of changes across the lifespan. This is a large theoretical perspective and is not one particular theory; many orientations are connected with these ideas and encompass the approach. For example, as we will discuss later in the chapter, the Selection–Optimisation–Compensation (SOC) model falls within this framework. As we will also discuss in more detail later

in the chapter, there are three ageing conditions or levels (Friedrich 2001): normal ageing, pathological ageing, and successful ageing.

Baltes (1997) and colleagues (e.g., Baltes and Smith 1999) have similarly divided the lifespan, although with regard to those at an older age. They differentiate between young-old adults (i.e., 60–80 years) and old-old adults (i.e., 80+ years of age). They refer to the young-old adults as those in their “*third age*” and the old-old adults as those in their “*fourth age*”. The *fourth stage* of the lifespan has been characterised by an enormous increase in numbers as the life expectancy is increasing globally. This is a great topic of focus as enhancing quality of life for these individuals is paramount when considering the illness and general deterioration of ability associated with this stage.

Paul Baltes and colleagues rooted their research deeply into the lifespan perspective (Baltes 1987; Baltes et al. 1980, 1992). They explain how there are seven propositions about the nature of ageing. Below are these assumptions as summarised by Schroots (1996):

- (1) There are major differences between normal, pathological, and optimal aging, the latter defined as aging under development enhancing and age-friendly environmental conditions;
- (2) the course of aging shows much inter-individual variability (heterogeneity);
- (3) there is much latent reserve capacity in old age;
- (4) there is aging loss in the range of reserve capacity or adaptivity;
- (5) individual and social knowledge (crystallised intelligence) enriches the mind and can compensate for age-related decline in fluid intelligence (aging losses);
- (6) with age, the balance between gains and losses becomes increasingly negative; and finally,
- (7) the self in old age remains a resilient system of coping and maintaining integrity.

Selective Optimisation with Compensation Theory

The selective optimisation with compensation (SOC) model conceptualises how people cope with age-related changes, adapt throughout their lives, and use strategies to maximise potential for successful ageing. The theory emerged from the gain/loss dynamic within lifespan development. This is the process of how we both grow (gain) and decline throughout the ageing process (Baltes 1987). For example, as we age, our declarative knowledge can continue to evolve (i.e., growth) and fluid functioning might reduce (i.e., loss).

The SOC theory has three main parts that encompass the gain/loss relationship for successful ageing. First, there is the strategic *selection* of focusing one's resources and adapting in terms of contexts, outcomes, and goal structures. It is important because it directs a person's behaviour based on

their hierarchy of goals, which is necessary because one's resources are often limited. There are multiple selection types (e.g., elective, loss-based-based). The two last parts are *optimising* potential by maximising the gains possible, and *compensating* for losses (Baltes and Baltes 1990; Freund and Baltes 2002; Baltes 1997). Baltes and Baltes (1990) illustrate how the SOC process is evident at a macro and micro level, and they describe nursing homes as an example of how to design an age-friendly environment at a macro level. First, selection may occur when older individuals have a more accessible environment so they can opt for goals that are now more important to them, such as finishing books on their reading list, and can give up other activities that are less desirable. Next, optimisation could occur through the stimulating opportunities presented to the individuals in the home, such as a continued learning course. Last, compensation could be the availability of programs or medical technology to maintain the health of the individuals in the home.

Sociological and Social Theories

Social and sociological theories of age focus more broadly on how people change with age and interact within their social environment. "Social environment" refers to multilevels of context including, for example, the workplace and community as well as interpersonal relationships. The process of ageing is treated as a lifelong process where it is critical to examine the "person in social context" in order to understand how age influences important outcomes.

Disengagement theory (Cumming and Henry 1961) states that as someone ages, there is a mutual separation (or disengagement) from society. More specifically, they are hypothesised to withdraw from society and society to pull away from them. This withdrawal can be initiated through the workplace. By retiring, the individual voluntarily (or involuntarily) withdraws or leaves the work environment. In turn, that environment engages less with the individual. According to Cumming and Henry (1961), this mutual disengagement is associated with successful ageing and is inevitable for all individuals. Activity theory emerged as a response to disengagement theory, and states that individuals who continue to participate by engaging and fulfilling activities are more likely to age successfully. This higher level of productivity is posited to lead to greater life satisfaction (Achenbaum 2009; Havighurst and Albrecht 1953). Continuity theory (Atchley 1989) states that bringing consistency from middle age to older age is adaptive for ageing. By utilising preservating strategies (e.g., activities, behaviours, relationships), people can utilise their established foundation from the past.

Socioemotional Selectivity Theory

The socioemotional selectivity theory (SSC) focuses upon the premise that as we age, our perception of time shifts (e.g., Carstensen et al. 1999). Among younger people, the future seems more distant than among people who are older; therefore, motivations and goal-seeking vary between these groups. For example, younger people are more likely to invest in the future while older individuals may focus upon enhancing current relationships and events. There are three assumptions reflected in the SSC theory: (1) social interactions are of deep importance to our lives, (2) humans act in ways that are guided by goals, and (3) we often hold many goals, so prioritising by choice is often necessary (Carstensen et al. 1999). Coming from these presumptions, SSC recognises that not only will these goals shift throughout the lifespan due to the distinct time limitations at hand, but the selection of goals will change as well. For example, younger people will be more motivated to have knowledge-related goals while later in life, as they age, emotion-related goals will be more important. Further, an older person is more likely to reduce their social interactions with new acquaintances while increasing time with people who are more emotionally meaningful to them. That is, goals that satisfy emotional needs in the present are more important than seeking future-oriented goals.

Convoy Model of Social Relations

The convoy model emphasises the interaction between individual development throughout the lifespan and social relations (Kahn and Antonucci 1980). One's convoy—or the social relationships and interpersonal interactions that surround an individual— influences a person's life experiences, perceptions, development, gives them social support, and so on. For example, the convoy model explains how social relations influence both psychological and physical health as someone moves across the lifespan (Antonucci et al. 2009). A convoy can provide three broad types of support: aid (e.g., concrete assistance like money or advice), affect (e.g., emotional support), and affirmation (e.g., communication to the person of interest regarding values, norms, goals, and aspirations) (Kahn and Antonucci 1980). It is likely that a person's social network will vary depending on their personal characteristics (e.g., age, gender, and race) and situational characteristics (e.g., environment, culture).

In sum, it is important to understand the range of age theories and the specific concepts and processes underlying ageing. These theories have emerged over a number of years and suggest a number of ways of conceptualising age.

However, until recently, the actual operationalisation of age has almost uniformly been in terms of one's chronological age. The use of alternative measures of age is a relatively recent phenomenon. In the next section, we will begin with a brief discussion of chronological age and move to a presentation of alternative measures of age.

Measures of Age

Chronological age, or calendar age, can be a useful tool of measurement. It can provide us with general information such as predicting social behaviour, attitudes towards safety at work, susceptibility to certain diseases, and much more. This measure of age is practical for the organisation and regulation of society. Chronological age determines much of our lives systematically. For instance, the ages at which individuals can vote, drink alcohol, rent a car, and work a job are determined by these numbers. Chronological age is often used as a cut-off for legal measurement, for example, to separate older workers from younger workers. Further, chronological age is used to determine when a worker can retire from paid employment. For example, in France and Korea, the retirement age is 60 years; usually 65 years in Australia, Belgium, Canada, Denmark, Italy, Mexico, and the USA; and 67 years in France and Korea.

Although chronological age can be a useful reference tool, it does not capture all of the information necessary or the narrative of the individual. People with the same calendar age can be entirely different, and development throughout the lifespan is not steady and universally similar. Baars (2009) describes chronological age as something that is “external”. She explains how it is important for the ageing field to move away from this external measure to what is the “intrinsic” time perspective.

It is rare to find an explicit definition of an older worker in research (McCarthy et al. 2014). Ashbaugh and Fay (1987) demonstrated how it is difficult to gauge the age at which someone becomes old in the workplace because the threshold is defined differently across individuals and within the literature. McCarthy et al. (2014) recognise how the current understanding of what is old at work (i.e., a broad age range that typically varies across sources) is unhelpful. In order to address the lack of consensus for defining an “older worker”, McCarthy et al. (2014) examined this question. Rather than finding a solid consensus, they found a range from 28 to 75 years of age with a median of 55 and a mean of 52.4. This illustrates why it is important to recognise that chronological age is not always the most useful or accurate measure when used alone to denote when one becomes old in the workplace. It is best when used with other alternative measures.

The concept of an “older worker” is multidimensional; therefore, chronological age can only provide a narrow aspect of this construct (Cleveland and Lim 2007). It is possible for two workers with the same chronological age to be different enough to where one may be considered to be an older worker while the other one is not. However, it is important to note that chronological age is linked with predictable changes across a number of domains that involve health, work, family, and life changes. There are some fairly stable physiological and cognitive changes that occur among human beings as they age, including changes in eyesight, muscular mass, and so on. However, there are significant individual variations associated with these changes, resulting in chronological age reflecting only a general marker of becoming “older”. Because it is difficult to concretely classify the age at which someone becomes old at work, it is important for us to also use alternative age measures in order to further understand this construct. Chronological age does not always provide an accurate picture of where a person is along biological, functional, psychological, or social dimensions.

Alternative Age Measures to Chronological Age

Examining additional measures of age in the workplace has become something of greater interest. Prior to attention being given to work and ageing, there was gerontological or industrial gerontological research focusing on facets of ageing. Below, we provide several alternative measures to chronological age:

Biological Age

Biological age is where a person stands in relation to the number of years that they will live or their longevity, although it cannot usually predict a person’s life length with great accuracy. Another way of defining biological age is in terms of the body’s organ systems and physical appearance, especially in comparison with others with the same chronological age (e.g., age peers). Even within biological functions and appearance, however, there are many aspects or dimensions—for example, blood pressure, cardio health, grey hair, etc.

Functional Age

Functional age refers to a person’s level or “age” of competence in performing certain tasks (e.g., McFarland 1956, 1973). Like biological age, functional age

involves a comparison with age peers. Further, functional age can vary within the same individual, depending upon the functional capabilities involved. Functional age then is often assessed in relation to a specific context or set of activities or jobs.

Social Age

Social age is encompassed of the views held by most members of a society regarding what individuals of a particular age group should do and how they should behave. For example, this might be the perceived age to marry, have children, or when to move out from home. A person who is 45 years old and just having a first child might be considered socially younger than if he or she had a child at 28. Neugarten and Reed (1997) referred to this as a social clock that people use to assess whether their own progress or the progress of others is on time or off time.

Subjective Age

The actual age at which an individual is seen or perceived as entering middle age or older age depends, in part, on his or her own chronological age. Historically, subjective age has been measured using a one-item measure (e.g., How old do you feel?), and then this is compared with their chronological age. People in their 20s tend to believe middle and older age begin at a lower chronological age than do older individuals. People in their 60s often consider themselves to be middle age. Further, the gap between chronological and subjective age becomes wider as individuals become older. For example, older individuals often feel younger than their chronological age would indicate (Goldsmith and Heiens 1992). In addition, the gap between chronological and subjective age is wider for middle-aged and older women than it is for middle-aged and older men (Montepare and Lachman 1989).

Physical Age

In addition to the psychological alternative measures of age described above, there are also numerous physical measures of age. For example, Sanderson and Scherbov (2014) have recently explicated the concept of measuring age from handgrip across subgroups. Handgrip has also shown to be a good predictor of future morbidity, mortality, and other health outcomes related to

age (Sanderson and Scherbov 2014). Rhodes (2009) explains how we can estimate the age from looking at faces, and Christensen et al. (2009) show how we can predict age by using perceived age as a biomarker. Unlike the psychological perceived age measures described earlier, these health professionals described perceived age as the way someone appears in a photograph. Using twin studies, they found that the twin with the higher perceived age, as indicated by a neutral third party, was less likely to survive longer than the twin with the lower perceived age.

Work-Based Age Measures

Throughout the work literature, there has been substantial emphasis placed on Sterns and Doverspike's (1989) five conceptualisations of age: chronological, functional, psychosocial, organisational, and lifespan age. These approaches to age are well cited, used in a vast amount of current research, and overlap with many of the more current versions of alternative age definitions (McCarthy et al. 2014; Segers et al. 2014; Sterns and Miklos 1995). Chronological age is the most commonly used descriptor of age. This is one's "legal" age and is determined by the calendar. Functional age is a performance-based definition of age that refers to the biological changes (physical and mental) that occur as chronological age increases and how this impacts work. Psychosocial age involves social perceptions; therefore, being older in this sense relates to how someone perceives their age, how others perceive their age, what are the consequences of being labelled as an older worker, and how society views older workers. Organisational age refers to the length of time (tenure) that the individual has spent in their job or the organisation. Lifespan age takes into account one's chronological age, cohort/generational variables, and unique career and life circumstances—these are all combined and are responsible for life changes throughout age. This age measurement emphasises how a person's lifespan age is unique and behaviour may change during any point in the life cycle.

Person/Context-Based Age

Cleveland and Shore (1992) extended this model to suggest that approaches to defining workers' age can be categorised into two distinct types of perceptual age measures: person-based age measures and context-based age measures. Cleveland, Shore, and Murphy (1997, p. 240) explain that person-based age measures "refer to the individual and do not involve a specific comparison, whereas context-based age measures (e.g. I am younger than most people in

my profession) involve a specific comparison with others or with a group". This particular model comprises the person-based age measures of chronological age, subjective age, and functional age; and the context-based age measures of social age and organisational age. These measures are broadly similar to the perceptual age measures outlined by Sterns and Doverspike (1989).

Prism of Age, Age Matrix, and Age Cube of Work

In order to provide organisational dimensions to several of these age measure alternatives, researchers at the Sloan Center for Ageing and Work developed the Prism of Age (Pitt-Catsouphes et al. 2010). Pitt-Catsouphes et al. (2010) further extended Sterns and Doverspike's (1989) and Cleveland and Shore's (1992) models to include generational age, tenure age, and career-stage age. Generational age refers to individuals born within a certain time period. Four generations now exist in the workplace: Traditionalists (born before 1946), Baby-boomers (born 1946–1964), Generation X (born 1965–1980), and Generation Y (born after 1980; sometimes referred to as the Millennials) (Johnson and Lopes 2008). Generational age therefore may play a role in defining workers' age according to the generational time period within which they were born. While tenure age refers to the number of years an individual has worked for an employer, career-stage age describes an individual's stage in their career. Lawrence (1988) found that age at work is linked to beliefs about an individual's career, or indeed, their career opportunities. There is also some evidence to suggest that the gender of a worker has a bearing on how they are defined as "older". For example, research by Kite et al. (2005) found that people consider females to be older at younger ages than males. While confirmatory evidence is lacking in this respect, the few studies that have investigated "gendered aging" effects (see, e.g., Ainsworth 2002; Itzin and Phillipson 1993, 1995) found that women can experience more unfavourable employment-related outcomes than men in the workplace as they age—the so-called double jeopardy. As such, older women may therefore be more susceptible to ageist attitudes in the workplace than older men.

There are nine dimensions that make up subjective age within the Prism of Age, and these dimensions function as the nine "lenses" through which one can have a different age perspective. These are: (1) generational age (using the typical USA-derived generations), (2) physical-cognitive age (a combination of physical and cognitive capacities to function in the work environment), (3) socio-emotional age (reflecting developmental needs and pursuits, such as generativity), (4) relative age (age compared to others in a particular

environment), (5) normative age (a perception of being ahead or behind of some age-appropriate expectations in society), (6) life events age (the number of major life events one has or is currently experiencing), (7) occupational age (what career stage one is in), (8) organisational age (tenure), and (9) social age (the age others perceive an individual to be).

In order to make more specific predictions regarding subjective age perceptions at work, Finkelstein, Heneghan, Jenkins, McCausland, and Siemieniec ([in progress](#)) redeveloped the Prism of Age by crossing dimensions against each other to consider age in a multidimensional way. Finkelstein et al. ([in progress](#)) acknowledged how some of the dimensions were more substantive (looking at some quality of the person), whereas the others were more perspective (considering a point of view). This product is called the Matrix of Age, and this is achieved by crossing the two different types of dimensions in a grid. For example, along the vertical x -axis are the substantive dimensions (i.e., chronological, generational, physio-cognitive, life events, occupational, organisational, and socioemotional ages) and across the top horizontal axis are the perspective dimensions (i.e., absolute, relative, normative, social, and meta-perception).

To further explicate these age relationships, Segers, Inceoglu, and Finkelstein ([2014](#)) conceptualised the Age Cube of Work building directly upon the Matrix of Age. The Matrix remains almost unchanged, except for the addition of a third dimension regarding context and the removal of the “absolute” perspective dimension. By considering situational factors within the Matrix of Age, the Age Cube of Work emerges as another examination of alternative age measures in the workplace. These context variables that make up the additional dimension are job, team, organisation, industry, and country. The main purpose of the Age Cube of Work was to generate empirical questions regarding work and ageing.

Navigating the Maze of Alternative Age Measures

While recent work in the USA has successfully yielded multiple alternative work-linked and relevant age conceptualisations, both the age prism and the Age Cube or matrix have yet to be empirically tested. Further, it is unlikely that except under extremely narrowly defined settings, all configurations of context-dependent age (e.g., Segers et al. [2014](#)) or age perspectives warrant the same level of consideration. Finally, the age prism, age matrix, and Age Cube are useful in conveying the transdisciplinary and cross-disciplinary nature of studying ageing with its concomitant multiple levels of analyses.

However, in the recent European literature, Schalk et al. (2010) specifically provided a highly useful representation of Sterns and Doverspike's categories. In addition, they incorporated a number of suggested indicators for each age category —perceived age). Further, Kooij et al. (2008) stated that there needed to be future research addressing the psychometric relationships among organisational and individual age measures as this is currently lacking.

Responding to this need, McCarthy et al. (2014) surveyed organisational decision-makers to determine: (1) at what chronological age do they consider a worker to be “older”, and importantly, (2) how did they arrive at that decision. Using the Sterns and Doverspike (1989) conceptualisation jointly with the age indicators provided by Schalk et al. (2010), McCarthy et al. (2014) found that the average age of older workers ranged from 28 to 75 years with a mean age of 52.4 years ($SD = 6.95$) and a median age of 55 years. Further, younger decision-makers (less than 35 years) categorised a worker as older at a younger chronological age ($M = 50.91$) than middle-aged ($M = 53.11$) or decision-makers over 50 years ($M = 53.46$). No differences were found among decision-makers and age assessment by gender, position, organisational tenure, or industry type.

More recently, Cleveland and Hanscom (2015) extended the findings of McCarthy et al. (2014) and also surveyed employees to determine at what chronological age a man, a woman, and a worker are considered “older”. Results indicated that men are more likely to report lower ages ($M = 50.5$, $SE = .86$) for when a woman becomes old, whereas women report higher ages on average ($M = 54.33$, $SE = .65$). Similarly, although across the groups, the numbers are higher, men are more likely to report lower ages ($M = 52.55$, $SE = .79$) for when a man becomes old, whereas women report higher ages on average ($M = 56.61$, $SE = .60$). Overall, women tend to report that it takes someone longer to be considered “old” than men.

There is a proliferation of age measures, and there is a clear need to thin this field. We reinforce Kooij et al. (2008) and Schalk et al.’s (2010) call for research that examines both the psychometric properties of our age measures/perspectives as well as understand their interrelationships (if any) and usefulness.

Emerging Conceptualisations of Ageing and Alternative Age Measures

There is renewed interest and energy regarding the conceptualisation and empirical research surrounding subjective ageing and awareness of ageing, especially within social gerontology, lifespan psychology as well as life

course sociology (Diehl et al. 2015). Since Kastenbaum's suggestion over 40 years ago that a person's subjective sense of age encompasses assessments of how old one looks and how old one feels, there has been significant renewed interest in the gaps between one's chronological age and felt age (e.g., Kastenbaum et al. 1972). This renewal reflects both theoretical and empirical contributions in recent years. Theoretical developments have included the proposed construct of awareness of age-related change (AARC, Diehl and Wahl 2010), stereotype embodiment theory as a framework to understanding age-related stereotyping, self-stereotyping, and ageisms, as well as Montepare's (2009) elaboration of the theoretical underpinnings of subjective age and age identity.

In addition, empirical contributions since the late 1990s have contributed to the renewed interest in subjective ageing. These include research outcomes from the Berlin Aging Study, where components of subjective ageing predicted mortality (Maier and Smith 1999), the Ohio Longitudinal Study (Levy et al. 2002) which showed that positive self-perceptions of ageing were linked with, on average, 7.5 years longer life than more negative self-perceptions, as well as evidence that subjective ageing was linked with health outcomes including adjustment to health challenges (Wurm et al. 2013).

Multidimensional Subjective Age

Using a self-regulation framework for articulating the experience of ageing, Barker O'Hanlon, McGee, Hickey and Conroy (2007) developed a multidimensional subjective ageing scale. According to this model, people develop a perception of their health, including threats and illness that can be categorised into a series of themes (Levanthal et al. 1984). These themes or dimensions include identity (beliefs about the name and characteristics of the illness), timeline (beliefs about the duration and course of the illness, specifically whether it is acute, chronic or cyclical in nature), consequences (beliefs about the impact of the illness on one's life), control (beliefs about the likely cause of the illness), and emotional representations (emotional response generated by the illness). Initially, these dimensions were operationalised in a widely used survey in health psychology, the Illness Perception Questionnaire (IPQ; Moss-Morris et al. 2002). These dimensions were translated and modified into an ageing context and named the Aging Perceptions Questionnaire (APQ).

The Aging Perceptions Questionnaire

The APQ (Barker et al. 2007) is composed of five general dimensions: identity, timeline, consequence, and control and emotional representations in parallel with the IPQ. Identity refers to one's beliefs about ageing and specifically links ageing and health changes. It consists of questions about 17 health-related changes and asks subjects to first indicate whether they experience these changes over the last 10 years and if yes, whether they attribute these changes to getting older. Often older individuals link age with health changes, particularly physical declines, even when the assumption that these changes are due to age may be inappropriate. The remaining seven dimensions or subscales examine views about ageing.

Timeline, which has two sub-dimensions, refers to individuals' awareness of ageing and their experience of it over time. The sub-dimension of timeline chronic refers to the awareness of one's ageing as chronic yet continual. It is related to the notion of age identification, which can predict poor health and physical inactivity. The sub-dimension, timeline cyclical, refers to the extent to which a person experiences variation in awareness of ageing. Sometimes, they feel old; other times, they do not.

Consequences or beliefs about the influence of ageing on one's life across work, family, and personal domains also have two sub-dimensions: consequences negative and consequences positive. Beliefs regarding the positive consequences of ageing are linked with creativity and greater subjective well-being. On the other hand, beliefs regarding the negative consequence of ageing tend to be associated with depression and lower subjective well-being.

The dimension identified as control refers to one's beliefs about controlling and managing the experience of ageing. Again, like the timeline and consequences dimensions, control has two sub-dimensions: control over positive experiences (e.g., "quality of social life depends on me") and control over negative experiences (e.g., "degree of mobility is not up to me"). This dimension includes one's efforts to control their environment to adapt to their needs and also the ways in which one interprets and reinterprets their situation or themselves so they can adapt in situations that they cannot control.

The final dimension on the APQ is emotional representations and refers to one's emotional response to one's ageing. It refers to negative emotions such as worry, anxiety, depression, and anger. Such responses to ageing are associated with maladaptive coping as well as negative changes in physical and functional health.

Initial research on the APQ has shown that it has solid subscale reliabilities and confirmatory factor analyses that support the scale structure of the questionnaire. Further, hierarchical regression analyses showed that subjective ageing independently contributed to physical and psychological health beyond socio-demographic variables (e.g., age, gender, education, and income) and physical health indices (Barker et al. 2007). Importantly, using the APQ to predict financial retirement planning among older workers, Heraty and McCarthy (2015) found that older workers with more positive beliefs about their ability to control aspects of ageing (e.g., control subscale of APQ) were more likely to engage in financial planning for retirement. In addition, older workers who had an intermittent as opposed to constant, awareness of ageing (e.g., timeline subscale) were less likely to engage in such planning.

Awareness of Ageing

Building on the work of Steverink et al. (2001), Diehl and Wahl (2010) have elaborated on the concept of understanding people's AARC. Specifically, AARC is defined as "a person's awareness that his or her behaviour, level of performance, or way of experiencing life has changed as a consequence of having grown older" (Diehl and Wahl 2010, p. 342). According to Diehl and Wahl, the construct varies from other measures of subjective age in a number of ways. First, AARC emphasises the awareness of some change so the individual must be able to verbalise their perception. Second, the person must attribute the change to chronological age or the passage of time. Third, it is viewed as a precursor to adaptation or lack of adaption although not adaption to objective ageing change, rather to more subjective (and thus, need not be objectively accurate). The construct can include both loss or negative change as well as gain-related or positive change. Importantly, AARC, with recognition of positive age changes, can serve to motivate an individual to constructively adapt and optimise their situation to counterbalance less positive changes. AARC draws from multiple theoretical perspectives, including general self-awareness, identity theory, and self-efficacy (Diehl and Wahl 2010).

The AARC construct is multidimensional including five behavioural domains: health and physical functioning, cognitive functioning, interpersonal relations, social-cognitive and socio-emotional functioning, and lifestyle and engagement. Health and physical functioning includes the perceptions of change associated with physical appearance, including grey hair, wrinkles, weight as well as development of chronic diseases such as arthritis or diabetes or decline in stamina and physical endurance. Although there has been

research on the ages at which objective changes occur, there is little linkage with how these changes are subjectively perceived (Newell et al. 2006).

There are three subcomponents of the second dimension, cognitive functioning, including memory functioning, slowing in speed of information processing, and intellectual functioning and learning. The first refers to memory loss, especially in terms of names, locations and faces (Hertzog and Hultsch 2000). The second facet refers to speed of information processing (Salthouse 1984). Older individuals may take longer to read signs in new places or in terms of computing values. Finally, older individuals may become more aware of how well they learn new material (Schaie et al. 1994).

Successful Ageing

Related to both subjective age and awareness of ageing is the construct of “successful aging”, particularly at work (Hansson et al. 1997; Shultz and Adams 2007, Zacher 2015). Prior to the positive psychology movement, the term “successful ageing” had been introduced in the 1950s by Birren (1958), Havighurst and Orr (1955), and others (e.g., Gumpert 1954). Within the gerontology and lifespan development literature, successful ageing research reflected an alternative orientation and perspective on old age and the ageing process. Until this time, gerontological research had largely focused upon the negative consequences of growing old, including cognitive and physical declines, social withdrawal and depression, dependency, and negative economic impacts (Zacher 2015).

In order to understand successful ageing, ageing in general can be thought of as involving three conditions or levels (Baltes 1997; Friedrich 2001; Rowe and Kahn 1987): (1) normal ageing or “usual”, which describes how the average individual usually scores on any given age measure; (2) pathological ageing (or below average), which refers to the rate of ageing when either acute or chronic disease is altering the normal ageing patterns (e.g., Alzheimer’s disease); and (3) successful ageing, which describes persons living a long, productive, satisfactory life and are ageing above average in comparison to relevant physical, psychological, and/or social domains. Some individuals might not fully or accurately fit into any of these three conditions; however, other individuals may fit into several of the conditions.

Successful ageing is a controversial construct in the field of gerontology, with little agreement upon definition or assessment (Depp and Jeste 2006, Strawbridge et al. 1996, 2002). Successful ageing generally means that one is ageing well, and is often synonymous with the terms optimal, healthy,

successful, productive, competent, and vital ageing (as summarised in Depp and Jeste 2006). However, much criticism has centred on the definition and conceptualisation of successful ageing (Dillaway and Byrnes 2009). One criticism is that many definitions are too limiting and may leave out older adults who would otherwise consider themselves as ageing successfully (Dillaway and Byrnes 2009; McLaughlin et al. 2010; Strawbridge et al. 2002). In fact, research looking at the subjective versus objective classification of successful ageing found a large discrepancy in the number of older adults who were considered successful agers. Specifically, a greater number of older adults were considered successfully ageing according to their own ratings than objective criteria of researchers (Strawbridge et al. 2002). Gerontologists in the field also suggest that the definition might need to change, depending on one's age, taking into account age-related norms for declining physical or mental functioning (Baltes and Smith 2003; McLaughlin et al. 2010). In fact, a recent study found that older age was associated with higher ratings of self-rated successful ageing (Jeste et al. 2013).

One highly recognised theory by Rowe and Kahn (1987, 1997) posits that successful ageing is represented by a “low probability of disease and disability, maintaining high cognitive functioning and physical activity, and an active engagement in life”. Although Rowe and Kahn suggest a very broad, holistic definition of successful ageing, it may be more salient to focus on which specific dimensions of well-being and functioning are related to explicit outcomes, such as survival. Survival into old age has been used as a marker of successful ageing (Depp and Jeste 2006). As Rowe and Kahn (1997) suggested, successful ageing is multidimensional, and people could move “in and out of success”; this leaves questions regarding the utility of identifying individuals who are “successful” based on the separate categories of the model. Although this model is comprehensive, it may set a standard that is too high for many individuals. For instance, an analysis of older adults from the Health and Retirement Study found that less than 12 percent of individuals met Rowe and Kahn’s criteria for successful ageing at any given year (McLaughlin et al. 2010).

Similarly, Strawbridge et al. (2002) used Rowe and Kahn’s model to determine the prevalence of older adults (aged 65 and older) who were “successfully aging” in the Alameda County Study. These researchers found that less than one-fifth of the selected sample was ageing successfully according to criteria included in Rowe and Kahn’s model. However, subjective ratings indicated that roughly 50 percent of older adults from this study considered themselves to be ageing successfully. This finding suggests disconnect between what researchers and older adults define as successful ageing.

Few studies (exception: Strawbridge et al. 2002) have modelled predictors of survival using Rowe and Kahn’s framework, and no known studies

have looked at the importance of these predictors in predicting long-term survival (e.g., up to 25 years). Identifying which dimensions of successful ageing are most associated with long-term survival can provide researchers and practitioners with a better understanding of specific dimensions to focus on. In turn, having a more selective framework for identifying individuals who are ageing successfully can aid in developing proper targets for intervention.

Recently, Zacher (2015) reviewed and integrated prior research on successful ageing and offered a framework of successful ageing at work. This framework suggests a number of personal and contextual variables that serve to moderate the relation between workers' age and work-related outcomes. Altogether, we believe that the increased attention given in the ageing and work literature to theory development surrounding successful ageing has the potential to make significant contributions to our knowledge on older workers.

Conclusion and Future Directions

Research on "what is old" has shown that chronological age is an important component of understanding worker age, but it is not a sufficient index of this complex construct (McCarthy et al. 2014; Cleveland and Hanscom 2015). The abundance of alternative age conceptualisations reflects both a lack of satisfaction by work and gerontological researchers with the use of chronological age and increasingly, the deficiency of chronological age in capturing the experience and changes associated with ageing, particularly at work. Further, there is evidence from the gerontological literature that after childhood, where chronological age serves as a reasonable developmental milestone, one's chronological age increasingly becomes a less useful description of one's "age". Historically, the initial alternatives to chronological age reflected one item or one-dimensional measures of some facet of subjective age or relative age (one's relation to some external reference such as their co-workers). Although a number of these single-item measures did contribute uniquely to the prediction of health outcomes, they were not theoretically grounded (as in later models, such as Prism of Age or Age Cube) nor is there significant evidence that they contribute uniquely beyond chronological age to predict work outcomes (Cleveland and Shore 1992).

More recently, multidimensional measures of subjective age, awareness of age-related changes, and successful ageing are all promising concepts to pursue in relation to understanding the links between age and important work outcomes. Each is grounded theoretically, and each demonstrates current value

in predicting important health outcomes, health-promoting behaviours, and well-being. We urge work and age researchers to move beyond the work and manager literature to examine alternative age measures in the prediction of behaviours at work—particularly, subjective age measures.

There are a number of research questions that we believe are important next steps. First, what are the psychometric properties of subjective age, AARC, and successful age measures? Are these overlapping measures, and if so, by how much? Each is based on similar core theories from the gerontology literature although each uniquely draws from other theories as well. Second, what work outcomes does each class of age measures predict? What unique contributions do various measures make and how do different measures operate jointly?

Third, what proximal (e.g., job, supervisor, co-worker) and distal (e.g., stereotypes, climate) variables influence employee perceptions of their own age and the age of their co-workers? Fourth, we find subjective age measures to be especially useful and important, both from theoretical and empirical perspectives. One of the poorly understood aspects of this key construct is its malleability. The beliefs workers hold about their age and the age of others are important, but the source and determinants of these beliefs are not well understood. Can beliefs be modified to enhance adaptability and successful ageing (SOC)? Does this imply that age is at least, in part, a state of mind? This leads to another research implication, what do these alternative age conceptualisations and measures indicate about our perceptions of younger people? What factors among younger people contribute to their age self-and other-perceptions? If we are interested in “what is old”, we need to not only examine older people but also investigate younger people to determine whether or not we can influence subjective age and well-being to enhance both one’s work and personal lives (e.g., Zaniboni et al. 2014). Given the clear evidence of the increasing chronological age of many members of the workforce, finding out how beliefs about what constitutes an “old” (and a “young”) worker develop and change is important.

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3

Towards an Identity-Based Approach for Examining Age in the Workplace: Perspectives and Implications

Michael J. Urick

Introduction

Studies of age issues in the workplace have been crucial towards understanding diversity in organisations. Many such studies have focused on perceived differences in younger and older workers, age stereotypes, and ways to attract and retain an age-diverse workforce. However, few studies have focused on the concept of age identity. This chapter advocates for engaging in age identity research by linking age stereotypes and labels to identity and by discussing potential implications for the workforce and research. In order to stress the usefulness of age identity research, this chapter examines age components, identity definitions, the importance of labels, and age stereotyping.

Age Components

To begin the discussion on age identity, it is useful first to discuss various conceptualisations of age. As is evident in many of the other chapters in this book, there are many ways to understand “age”. One important and useful conceptualisation schema was postulated by Sterns and Doverspike (1989)

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in an overview of conceptualisations of age (as they relate to training and learning in organisations). From their review, age is a multifaceted construct and inclusive of chronological, functional, organisational, lifespan, and psychosocial components—all of which influence the perception of social units, which this chapter defines as a group of individuals with some similarities (such as age) that are popularly believed to share the same values, beliefs, and behaviours.

From Sterns and Doverspike (1989), the first conceptualisation of age is “chronological”. The authors note that this understanding of age comes purely from biological (i.e. birth year) ranges and is influential to perceptions of age because this conceptualisation is often stated in legal requirements (such as the Age Discrimination in Employment Act of 1967). The second conceptualisation, the “functional” approach, is based on the performance of individuals and related to perceptions of experience, wisdom, and judgement in workplace situations. The third conceptualisation, “psychosocial”, is related to the perception that certain occupations or skills are fitting of particular ages. This particular conceptualisation obviously has strong implications for labelling members of age groups so that stereotypes come to be associated with particular ages. The “organisational” conceptualisation is related to how long an individual has been a part of a particular organisation or worked in a specific job. Finally, the “lifespan” conceptualisation states that age is a function of living such that people mature independently of others as each has their own unique experiences.

From this discussion, it should be noted that these conceptualisations overlap so that an overall understanding of age would be best informed by considering all five components together. For example, though the chronological understanding of age explicitly considers biological age, one’s perceived birth year (chronological) influences perceptions of how well that person will do in a job (functional) as well as perceptions of roles for which that employee would be best suited (psychosocial). Therefore, when considering age identity, stereotypes, and labels, each of these conceptualisations should be considered together. Furthermore, a discussion of age identity should consider how perceptions of each of these five areas are formed. These could include, but are not limited to “true age” (based on birth year), appearance (how old one looks), and personal feelings (attitudes about age). Each of these is likely to influence perceptions of behaviours, abilities, and values of employees, and therefore, could be useful starting points for the formation of age stereotypes, labels, and ultimately, identities.

Identity

According to the classic conceptualisation of organisational identity (Albert and Whetten 1985), identity includes those characteristics which are central, unique, and enduring to an organisation. As an organisation is a collective group of people (i.e. social unit), this definition could also be applied to a variety of other social units that are influential to an individual's identity (Albert 1998), including age group. In other words, age identity would include those characteristics that are central, unique, and enduring to members of a particular age. Furthermore, on a more personal level, identity is also how an individual defines self as she manages competing aspects of her own self-concept (Ashforth and Johnson 2001; Serpe 1987). In this sense, individuals use their knowledge of their age group's characteristics to influence their own personal identity. Though identities can be assigned by oneself and applied to one's own self-concept, identities can also be assigned to others (this is facilitated by the process of labelling noted below). In the latter situation, identity assigners often perceive that another person acts in a manner that fits a particular social grouping. Often these social groupings possess certain common labels that enable the perception of group existence. Social groupings, such as those based on age, help to inform one's social identity, which is a particularly influential aspect of an individual's overall identity.

Social identity is that part of an individual's self-definition that is influenced by membership with a particular social group. Social identity (Ashforth and Mael 1989; Turner and Giles 1981) and self-categorisation theories (Tajfel and Turner 1985; Ashforth et al. 2008) suggest that individuals are likely to define themselves by group membership as a result of perceiving that a group's attributes are consistent with their own values, beliefs, behaviours, and traits. This identification further reinforces boundaries between groups and suggests that individuals define themselves in relation to others. Boundaries between groups are strengthened when social identification leads to activities perceived to be congruent with the group identity and when these activities are believed to be fundamentally different than other groups' behaviours (Ashforth and Mael 1989). Therefore, when individuals are seen to possess characteristics and engage in behaviours that are consistent with perceptions of their age group, age boundaries are strengthened if these characteristics and behaviours are believed to be fundamentally different than those of other age groups.

According to Turner and Giles (1981), social identity theory presumes that an individual's self-concept exists, in part, because of his knowledge of being part of a larger group, such as a particular age cohort, so that the individual

strongly defines himself by being a member. This tends to occur when the individual values both the group and its members, and experiences positive emotions because he is a member (Ashforth et al. 2008). In this case, individuals perceive that the values between members (and themselves) are similar and want to see the reputation of their group as positive. Because of this, individuals who are highly identified with their age would not be happy to hear that their age group is discussed in a negative manner.

Self-categorisation theory (Ashforth et al. 2008; Hogg and Terry 2001), a related theory, postulates that people identify or dis-identify with others to fulfil the basic human needs of inclusion and differentiation (Brewer and Brown 1998). This theory further implies cognitive mechanisms whereby people classify themselves and others into groups in order to help reduce uncertainty. Such uncertainty-reducing motivations serve to create the illusion that members of groups are homogenised prototypical persons (Hogg and Terry 2001) and that they are similar to each other. This allows for members of one age to assume that others of their same age are all similar, while others of a different age are fundamentally unlike (though similar within their own age group).

Each person draws on a number of social identities to influence their overall self- and others-concept (Ashforth and Johnson 2001; Serpe 1987; Kreiner et al. 2006), and as noted, age can be one such social identity that influences overall identity. Age-based social identities become even stronger when clear age labels and stereotypes exist. Age-based stereotypes, labels, and identity are all mutually reinforcing in that they inform one another as they set expectations of perceived age groupings. Identity groups become most observable when they are named through labels and such labels emerge as perceived age identity groupings become salient. Similarly, as these age identity groups become more salient, stereotypes emerge to describe perceived prototypical characteristics. Furthermore, stereotypes help to form identity groupings through describing their perceived members. At the same time, stereotypes become clearer when labels become associated with prototypical group characteristics—the more the stereotypes become accepted, the more labels become known. The next section, therefore, discusses labels in more detail.

Labels

According to the Merriam-Webster Dictionary, “to label” means “to place a name on something so as to identify it” (“Label”, <http://www.merriam-webster.com/dictionary/label> 2014). In academic research, labelling impacts

identity in such diverse areas as delinquent adolescents (Jenson 1980), gender roles (Weinraub et al. 1984), minority groups (Rendon 1984), and age groups (Thornton 2002). In each of these areas, researchers note that labels are created to place a name on social groups (such as a generational label that refers to a particular age group). Furthermore, these labels often emphasise stereotypes of the group. Specifically related to age, labelling can have negative workplace outcomes such as a decrease in self-esteem (Rodin and Langer 1980). In other words, as a result of defining self-based on the labels associated with age-based stereotypes, workers may experience negative workplace-related outcomes. As such, these labels reinforce social identities stemming from age groups. Labels, therefore, are a crucial aspect in setting one's definition of self and others as well as in guiding expectations for acceptable behaviours (Biddle et al. 1985), particularly with regard to age. From informal conversations between the author and workers of various ages, participants identified several age-based labels. Older labels (both positive and negative) could include "experienced", "mature", "dinosaur", and "old fart", for example. Younger labels (both positive and negative) could include "inexperienced", "immature", "kiddo", and "young professional" for example. These terms were reported to influence each individual's self- and others' definitions.

As Ashforth and Humphrey (1997) state, such labels allow for the simplification of an organisation's social environment. While relying on labels for simplification of social situations can allow for speed in communication (such as relying on the young label of "newbie" to guide interactions like explaining the details of a work-related process in depth), labels can also lead to the de-individualisation of workers. In this example, the individual is labelled with a particular age descriptor and not seen for her own unique skills or abilities but rather those supposed to be possessed by all others with the same identity label. As such, she is likely to experience frustration in her work environment.

Furthermore, Ashforth and Humphrey (1997) suggest that identity labels are common, regularly agreed upon, and frequently leveraged in workplaces though they are often assigned to individuals arbitrarily (i.e. labelling an older worker as "experienced" when, in fact, he might be new to a particular type of job role). In addition, labels serve to guide not only one-on-one interactions, but they also influence intergroup conflict, group categorisations, and reputations of "types" of workers. Such outcomes are problematic if individual workers become marginalised when they are labelled with a stigmatised identity. This is especially true when considering that, in many cases, both young and old labels can carry negative implications (such as the "immature" label influencing the "entitled" stereotype of younger workers or the "mature" label influencing the "unteachable" stereotype for older workers).

As an interesting note, some labels often linked closely with age are also labels associated with one's generation. In the US workforce, popular practice has allowed for the labelling of four generations working side-by-side primarily on the basis of birth year, including Generation Y (Millennials), Generation X, Baby Boomers, and Veterans (Silents) (Smola and Sutton 2002). These generational labels have associated age-based stereotypes so that the labels themselves invoke expectations of group members. These labels are similar to the other age-based labels noted above, except that they are perhaps even more commonly promulgated by media outlets and within organisations (Urick 2013). Furthermore, such generational labels can serve to influence one's own self-definition when their related stereotypes are influential to identification or dis-identification with a generational group (Urick and Hollensbe 2014).

It should be noted, however, that age identity and generational identity are not exactly the same. Various types of generational identity exist and though many are related to common understandings of age, some conceptualisations of generational identity focus on groups possessing common tenure in the workplace (Joshi et al. 2010) or familial relationships (Joshi et al. 2011), for example. These conceptualisations differ from generational labels (Millennials, Baby Boomers, etc.) focused on birth year which when used as a base of identity, can help individuals draw on stereotypical age descriptors in forming their definitions of self and others. In order to continue to develop an age-based conceptualisation of identity, these age-based generational labels should be leveraged to build upon theory. However, age may not be as simple as being dictated solely by birth year, as noted in the previous discussion on defining age.

Related to the various ways of understanding age, labelling suggests placing a name on another (or self) that is based on perceptions, which in turn, can be derived from a number of aspects related to age (such as those aspects considered by Sterns and Doverspike [1989]). One obvious aspect is biological age (based on birth year; directly related to the "chronological" component from Sterns and Doverspike [1989]). An individual can label oneself or another as young, old, or another age-based identity based on their knowledge of biological age. For example, an employee who is known to be past typical retirement age could be labelled as "old-timer" or an employee known to be in their 20s could be labelled as "green" or "newbie" as well as other age-based labels noted above. Note also here that these labels have implications for expectations on how long an employee has worked in a particular role (organisational conceptualisation), how well they will be able to perform on the job (functional conceptualisation), and roles that would be appropriate for particular workers (psychosocial conceptualisation).

Another aspect related to age labelling is appearance. Appearance is typically assumed to change as individuals get older. For example, a younger worker may be expected to look young physically, whereas an older worker may be expected to have grey hair and dress conservatively. However, there are a few exceptions to this general rule. The first is that some young workers might look old (e.g. perhaps having hair turn grey earlier in life), whereas some older workers might look young (perhaps dyeing their hair so it does not appear grey). Of important note here is that the lifespan conceptualisation of age suggests that individuals age and mature in ways unique and peculiar to their own experiences so that individuals do not all age in the same manner (Sterns and Doverspike 1989). Therefore, age-based labels are not always appropriate as age appearance can be somewhat deceiving. It should be noted that perceptions are not limited to just physical attributes, but also social, emotional, and behavioural traits as well as potentially other characteristics. For example, one might be given an age-based identity and labelled as “immature” (i.e. younger) if they behave in a “me-centric” manner in the workplace despite their actual biological age.

An additional attribute related to age identity and labelling is personal feelings (both how one feels physically and whether their personal attitudes are in agreement with their perceived attitudes of others of the same age). An example may be related to the phrase “young at heart”, meaning that an individual feels youthful (or “old soul”, in which they feel more elderly) in either or both a physical and mental sense. These feelings could be greatly influenced by the psychosocial conceptualisation of age as this conceptualisation fundamentally considers labels stemming from perceptions of one’s own and others’ ages (Sterns and Doverspike 1989). Labels related to biological age, appearance, and internal feelings could help one set their and others’ age-based identities.

Influence of Stereotypes

Stereotypes can be defined as the beliefs about the characteristics, attributes, and members of certain groups (Hilton and von Hippel 1996) so that they serve as schemas or cognition categories that people use to process information (Avolio and Barrett 1987; Weber and Crocker 1983). Such schemas and categories allow for the grouping of individuals. Expectations are then set for these groups regarding anticipated behaviour (e.g. younger workers are expected to leverage flexitime arrangements at work). Stereotypes also help to influence methods of responding to group members (Chao and Willaby 2007; McCauley et al. 1980). For example, organisations *expect* younger

workers to leverage flexitime, and so they institute policies to allow for flexible work arrangements (despite not actually asking employees if this is of value to them). Stereotypes also serve to generalise the behaviour of a member of a particular group to others in that group, as each group member is believed to behave the same (Hilton and von Hippel 1996). The act of stereotyping occurs when there appears to be diversity among organisational members (Jackson et al. 2003), such as when employees of various ages work within the same organisation or team. Stereotypes emerge, in part, from the need for understanding the identity of self and others (Hilton and von Hippel 1996) so that behaviour can be explained by membership of a certain group such as age cohort.

Perhaps from this need for identity and from hearing about stereotypes so frequently, individuals come to understand the prototypical characteristics associated with their age group. If this occurs, individuals can come to define themselves in terms of being members of a group based on stereotypes, and not necessarily actual group characteristics (if these stereotypes are inaccurate). In other words, the group values, traits, behaviours, and beliefs that individuals perceive can be inaccurate. With regard to age, there are a variety of age-based stereotypes that have been shown to be inaccurate (e.g. younger employees intend to leave their jobs quickly, younger workers are less satisfied with their jobs, and younger workers are not committed to their workplace; Costanza et al. 2012). Yet, these stereotypes exist in reports from popular media.

Additional research has explored the effects of these age-based stereotypes in the workforce. Such stereotypes set perspectives of employees of certain ages, which can lead to discrimination. A majority of studies of age stereotypes focus on how they perpetuate negative attributes of older workers (Thornton 2002). Some such stereotypes, for example, include that older employees are uninterested in career development, are less trusting, and are less willing to change (Ng and Feldman 2012). In a meta-analysis, Ng and Feldman (2012) showed that though many common negative stereotypes do not truly describe older workers, there is still increasing evidence of discrimination against older employees (Hedge et al. 2006; Lieber 2007; Prewitt 2005) due to stereotypes of the group as older persons are judged significantly more unfairly than younger workers (Kite and Wagner 2004; Singer 1986).

In addition to discrimination, which can lead to negative HR-related consequences (such as unfairness in hiring or promotions; Grima 2011), additional outcomes of age-related stereotyping include workers conforming to stereotypical expectations (known as stereotype threat) (Maurer et al. 2003) which, in turn, has an influence on their identity (“I am part of this

age group, and so I should conform to specific stereotypes to set my own self-definition”). Furthermore, stereotypes cause an increase in tension and conflict between workers of varying ages (Hassell and Perrewe 1993; Stark 2009) because they help create identity in- and out-groups (“I belong to this particular age and, as such, I am fundamentally different from individuals in other age groups”). Furthermore, there is a perception that there are “certain jobs” for particular ages (Posthumus and Campion 2009), and these, in turn, might also be influential to identity as workers also use their employment roles in their self-definition. As such, an individual’s identity might be doubly influenced by age stereotypes and roles (“I’m a young worker and, therefore, I should conform with the expectation to be good with technology and will limit myself to applying only to tech-oriented roles”). Some of these issues related to age stereotypes and identity stem from age-based labels.

The interrelatedness of age-based stereotypes, labels, and identity influences definitions of self and others. In other words, people draw on stereotypes, labels, and age components of identity to form their own personal identity and the identities that they perceive others to possess. Often, a comparison between or perception of self- and others’ identities (as well as a potential mismatch between how one defines self and how others define her or him) could lead to several outcomes noted in the “Implications for Future Research” section such as conflict, biased HR-related decisions, and focusing on non-work-related behaviour while on the job.

Summary

Extant research has drawn on the various elements of age noted above to suggest that individuals often draw on subjective age, others’ views of one’s age, a desired age, hopes for longevity, and perceptions of old age in crafting identities (Kaufman and Elder Jr. 2002). Working together, multiple conceptions of age inform identities and self-definitions (Barak 1987). Age identity, therefore, can be defined as the part of self- or others’ definitions drawn from the stereotypes associated with multiple conceptualisations of age-informed labels. To summarise the above discussion, please see the conceptual model in Fig. 3.1.

From Fig. 3.1 and the preceding discussion, it is clear age identity in the workplace is a complex phenomenon. Age identity is based on various conceptualisations of age, noted on the far left side of the model. Understanding age using one of these conceptualisations allows for the labelling of individuals using age descriptors and titles (e.g. leveraging the title “mature” as evidence

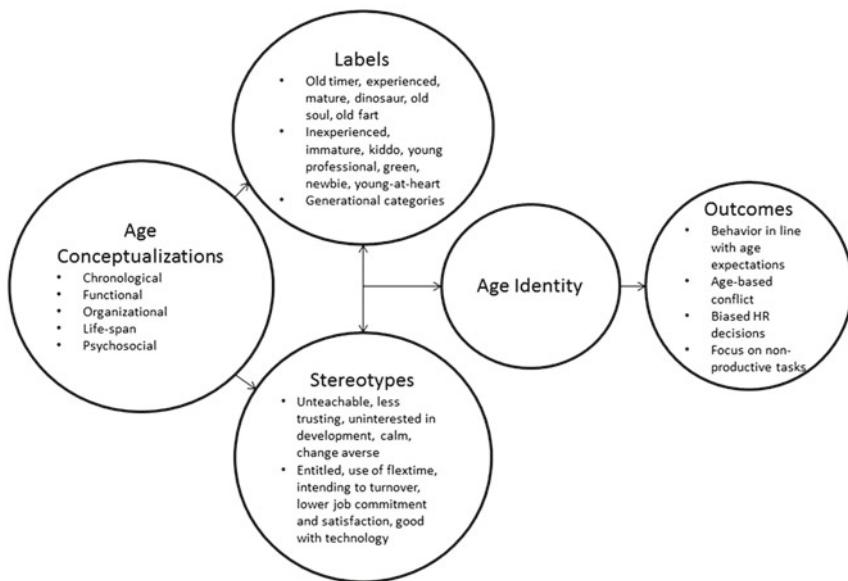


Fig. 3.1 A model of age identity

of the “lifespan” conceptualisation). The conceptualisations of age also influence the age-based stereotypes (e.g. stereotyping someone far along the “lifespan” conceptualisation to possess the characteristic of calmness). Therefore, the conceptualisations of age influence both labels and stereotypes which, in turn, are mutually reinforcing. To discuss whether stereotypes or labels come first is like asking which came first, “the chicken or the egg”, so this model suggests that they emerge at roughly the same time. Stereotypes strengthen the prevalence and use of a label while labels invoke and identify a stereotype (e.g. labelling someone who is perceived to be calm as “mature”). From the knowledge of labels and stereotypes, individuals will define themselves and others based on age so that it forms part of their identity. By possessing certain age identities, individuals are likely to experience particular workplace outcomes.

Though this chapter presents a model of age identity, there is much more work to be done in understanding this phenomenon. Despite extant studies related to age identity having focused on topics as diverse as television viewing (Harwood 1999), socioeconomic status (Barret 2003), and health and well-being (Coupland et al. 1989), age identity issues have not been thoroughly examined with regard to their implications in organisations and the outcomes listed here, though theoretically supported, have not been tested empirically. The lack of research in this area is unfortunate, as age identities could have

important implications both in the workforce and for research in the area of organisational behaviour to which this chapter will now turn its attention.

Practical Implications for the Workforce

Viewing age as an influencer of identity has several implications. First, this chapter considers implications for individuals and managers working in organisations. Next, implications and future directions for research in the field of organisational behaviour will be addressed in the following paragraphs.

As noted earlier, social identity and self-categorisation theories focus on intergroup relations in that they emphasise how individuals define themselves and others. Because of stereotypes and labels that help set expectations individuals have of other people, it is likely that conflict emerges because of an “us vs. them” mentality. Identity-based conflict can be present in organisations (Urwick and Crandall 2012) and such conflict is difficult to solve, especially when parties define themselves as being in direct opposition to other groups (Fiol et al. 2009). Some examples of age-based identity conflict can occur when one age of workers labels another with an identifier (i.e. inexperienced, old-fashioned, etc.) that leads to frustration within the group when the labels are interpreted negatively. Identity conflict related to individuals’ ages and associated labels presents a variety of problems to organisations and managers, including increased tension, a breakdown in communication, and misunderstanding (Urwick et al. 2012), all of which can lead to a loss in organisational effectiveness, productivity, and other negative organisational outcomes. As such, managers need to understand these identities and facilitate interactions appropriately so as to minimise these negative outcomes.

Managers can help to facilitate inter-age interactions in several ways. First, they can provide training to employees in which participants learn that many age-based stereotypes are misconceptions. By articulating these stereotypes and illustrating how they are inappropriate, employees may be less likely to leverage them to (either consciously or subconsciously) influence the interactions that they have with colleagues of other ages. In addition, by understanding age identities and their stereotypes, managers can identify when they witness the use of potentially derogatory associated labels in workplace interactions and provide coaching to employees regarding why such labels and stereotypes are inappropriate. Finally, when witnessing an interaction characterised by conflict or tension, managers can understand that they can be highly complex and rooted in identity. As noted by Rothman (1997), identity-based conflict is often difficult to solve. It may be confused with resource-based

conflict whereby two individuals (or groups) vie for budgetary allocations, work assignments, or other positive workplace outcomes because these things are often what are discussed or argued over at a surface level. Instead, these may be symptoms of underlying identity-based conflicts in which arguments over workplace resources are the results of stereotypes related to individuals' perceptions of others of a certain age. By acknowledging that a solution to such conflict would not be as simple as adjusting resource allocation but rather more complex because it relates to how people define one another in the workplace, managers can work towards a more effective solution.

Conflict can also occur within individuals and not just between individuals. For example, when defining self, individuals are influenced by how they are labelled by others and their understanding of stereotypes. To illustrate, when a worker feels that they are young, but are labelled by others as old, they could feel frustrated, less committed to the workforce, and potentially conflicted inside regarding their self-definition because of their external feedback (i.e. their labels and associated stereotypes such as addressed by Finkelstein et al.' (2012) discussion on age-based meta-stereotypes).

Whether it is an external conflict or an internal age-based identity crisis, any clash between identities will cause workers to focus on non-primary task-related issues while on the job. Additional age identity-related concerns, other than conflict, could also cause employees to focus on such non-primary task activities as well. For example, employees could carry emotional labour from having to display certain positive emotions (Barsade and Gibson 2007) despite feeling upset about being tagged with an age-based identity label that they disagree with. In addition, a dramaturgical approach has been applied to age-based generational stereotypes and their associated labels such as individuals labelled as "senior" trying to change their appearance (i.e. dyeing hair to look younger) or a "young professional" acting in a certain way to conform to generational stereotypes (e.g. forcing themselves to learn technology even though this is not their comfort area in order to conform to the age-based stereotype of being technologically proficient) (Urick 2014). In these situations, focusing on displaying stereotypical traits, adjusting appearance, or managing emotions forces employees to engage in non-productive work activities so that they are not as efficient as possible. Furthermore, constantly focusing on these work-related stressors that are not related to the primary duties of a job may also lead to burnout, especially when considering that employees still have primary tasks to accomplish which should require workers' majority of energy and time.

Perhaps most importantly, however, is that there are potentially negative human resources-related age-based issues that managers and organisations need to consider. For example, some age identities and stereotypes suggest that certain labels fit certain roles. To further illustrate, older workers can

be labelled as old-fashioned or unchanging. As such, these employees can be marginalised in the workplace as they might not be a manager's first choice for technology-related roles when competing with younger employees for job openings. Managers need to make sure they are using true skill-related and behavioural interview data, performance indicators, and evaluations, as opposed to the stereotypes associated with age-based identities, for HR-related decisions such as hiring, termination, promotion, and salary increases.

Specifically, managers need to constantly be asking themselves if the HR-related decisions that they are making are truly related to job fit and performance instead of based on misperceptions and stereotypes. The human resources department could, perhaps, be of assistance here by acting as a consultant to managers, by reminding them of past performance of the employees in question and by serving as a more objective party to the decision. Furthermore, by overseeing portions of the selection, promotion, and termination processes, HR departments can review that decisions are logical given their records of performance evaluations, development activities, and a review of resumes and applications of new hires. Having review policies documented and provided to managers, as well as setting the expectation that the HR department will oversee employment-related processes to ensure they are in line with performance and job fit, could help to minimise bias.

Implications for Future Research

Examining age as an antecedent of identity does not just have implications for the workforce, but for future research as well. One way is to further examine exactly how age stereotypes influence one's identity. Though this chapter advances a model illustrating that stereotypes influence identity and associated labels which, in turn, provide guidelines for expected behaviours, values, and beliefs, extant research has not explored the process of how this occurs nor details regarding the types of employees effected by age stereotypes. For example, as noted by Finkelstein et al. (2012), younger age stereotypes have been under-researched and this presents a significant gap in research. Such research would be useful to further explore the stereotypes associated with younger workers and how they help set their identities. This type of research might be guided using the model included in this chapter.

Research on age identity in organisations could also be strengthened by a closer integration with generational identity. As noted earlier, it is unclear how generations and age are related as, though many definitions of generation include age to an extent, definitions of generation are "fuzzy" (Parry and Urwin 2011), causing confusion among scholars who have disagreed over the

relationship between age and generation. Such confusion has resulted largely in literature on age and generations diverging in their focus despite the often converging aspect of temporal-based considerations of workplace phenomena. This is unfortunate as research on age diversity in the workplace is much more developed than generational diversity. In a recent review, Lyons and Kuron (2014) highlight areas in which generation diversity research could be improved while also noting that generational identity is a growing area in organisational behaviour research. While generational identity has grown, age identity has not been as well studied among organisational researchers. Age researchers and generational researchers, then, can learn from each other to integrate these two areas so that more will be learned about generational diversity and age identity by drawing on concepts and methodologies already studied in the other literature stream. One way in which generational studies can inform age identity studies is by leveraging the common age-based generational identity labels of Millennials, Baby Boomers, and Generation X to explore how their associated stereotypes (applied often because of perceived age) can inform self and others' definitions.

Other ways to grow understanding of age identity in the workplace would be to draw upon extant age identity research not previously focused on organisations. In the above discussion, three examples of age identity studies were noted. They are mentioned again below to advocate that these types of studies can be used to inform organisational literature:

- Age identity and work-related media. As noted above, extant studies on age identity have examined age identity and television viewing patterns. As television is one type of media for gaining information, organisational studies could focus on how employees gain information to fulfil workplace duties (e.g. a procurement specialist finding information on a new type of machine part that they need to purchase). Such studies could examine how individuals are informed by age-based identities to gather work-related information using various manners of technology, including internet sources (e.g. younger workers being expected to seek work-related information through social media).
- Age identity and socioeconomic status. Also mentioned above, extant studies have examined the relationship between status and age identity. Rather than limiting studies to socioeconomic status, organisationally based studies might examine status in the workplace more broadly by considering whether or not age identity is related to power, respect, and authority in organisations (i.e. the potential for one age group to be more respected or hold a majority of authority positions). Note here that this research

suggestion is related to the practical implication (noted above) calling for the need to minimise management decisions based on age stereotypes. Decision makers in organisations may possess a particular age identity and be biased towards others that do not possess the same identity.

- Age identity and health and well-being. As the last example stated above, age identity was studied in relation to health and well-being. Implications of this could be studied with HR-related decisions such as factoring in the perception of health while hiring or promoting a potential employee (i.e. an employee perceived to be older and in poorer health may be passed over for promotion or hiring due to the perception that they will not last as long in the workplace) as well as the perceived cost of providing healthcare to older workers. As mentioned above, these considerations of age identity are important to practitioners within organisations and they should also be studied by academic researchers. In this way, managers will be informed by best practices recommended by researchers. Furthermore, additional aspects that organisational researchers might consider are not only limited to physical well-being but could also include emotional well-being as possessing a stigmatised age identity label in a workplace could impact that individual's task-related job performance (through emotional labour, for example).

While these are but a few ways in which general extant age identity research can inform organisationally focused research, there are many others. The author firmly advocates using these pieces of prior research to help organisational researchers gain more knowledge on age identity phenomena in workplaces.

Furthermore, as this chapter is an early point in the discussion of age identity in the workplace, empirical evidence needs to be collected and analysed related to this construct. This work presents a discussion based on extant theory that logically suggests the age identity construct as a fruitful area of research. However, data supporting this construct both quantitatively and qualitatively is a natural next step in continuing the conversation.

Conclusion

To conclude, this chapter presents a theoretical basis for advocating an age-based identity construct. As such, this chapter has applied concepts related to social identity and self-categorisation theories, stereotypes, and labelling to suggest implications for research and practice. Age identity is a fruitful area for research, and the author looks forward to seeing this construct emerge and develop in future works.

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4

An Integrative Psychological Perspective on (Successful) Ageing at Work

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Introduction

One of the most important societal trends affecting our workplace and workforce in the following decade concerns the combination of a smaller number of younger workers relative to their older counterparts, and the current ‘early exit’ culture in Europe. Because of the staff shortages and possible knowledge loss (e.g., Calo 2008; Joe et al. 2013) that may accompany these demographic changes, there is a strong financial reason to retain and sustain ageing employees at work (Kooij et al. 2014; Truxillo and Fraccaroli 2013). In order to respond to today’s labour market needs, many governments have chosen to increase the official retirement age to 66 or even higher. In the Netherlands, for example, retirement age will be gradually raised to 66 years in 2019 and to 67 years in 2023. Other European Union countries have similar plans to steadily raise their retirement ages to 67 years in 2023 (France), 2027 (Spain), or 2031 (Germany). In the UK and Ireland, the retirement

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age will increase to 68 in 2028 (Ireland) and in 2046 (the UK). However, the reality of older workers' current employment does not yet match these political ambitions. According to figures collected by the European Union Labour Force in the European Union Labour Force Survey (Eurostat 2014), the EU-28 (i.e., average of the 28 European Union countries) employment rate for persons aged 15–64 was 64.1 per cent in 2013. However, when looking more closely at the country level or when differentiating between age categories, the active labor participation of older European employees does not appear to be as high. The EU¹ employment rate of older workers—calculated by dividing the number of persons in employment and aged 55–64 by the total population of the same age group—was 49.5 per cent in 2013 (OECD 2014), whereas the OECD² average was 54.9 per cent in the same year. In the USA and Korea, for example, employment rates of workers of 55–64 years old were, respectively, 60.9 per cent and 64.3 per cent in 2013.

Therefore, one of the most demanding challenges for managers, and Human Resource Management (HRM) in particular, is to find effective strategies or policies that will stimulate or enable ageing workers to remain *employable* (i.e., engaged, healthy, and productive; see Van der Klink et al. 2011) members of the workforce (e.g., Kooij et al. 2014; De Lange et al. 2015). Unfortunately, of all the employees aged 55–64 years in 21 European countries, only 8.2 per cent participated in job-related training during the last month in 2012 (OECD 2012). For 34 OECD countries, this percentage was 9.4. These outcomes conclude that, in general, older workers' employability is at stake, and that it is urgent to address this issue, both from a scientific as well as from a practical perspective. From a scientific vantage point, recent studies hint at the importance of specific bundles of HR practices in enhancing older workers' employability (e.g., Kooij et al. 2014), while the need for development does not appear to be the same for higher- versus lower-educated workers (e.g., Gründemann et al. 2014; Warr 2008). From a more practical standpoint, ageing and de-juvenization of workforces across the globe form an urgent reason to keep older workers employable throughout their careers. We argue that both employers' as well as employees' objectives should be carefully aligned in order to protect workers' employability across the lifespan. Concretely, a lifespan-aware and diversity-friendly HRM perspective (De Lange et al. 2015) that is characterized by specific, diversified HR activities in different career and life stages is necessary in order for people to grow old successfully and to sustain a Person-Environment (PE) fit at work (Baltes and Baltes 1990). PE fit refers to the degree to which an individual's characteristics

¹ Unweighted averages for 21 European OECD countries.

² Unweighted averages for 34 OECD countries.

correspond with those of his/her work environment (Kristof 1996). As we will describe in the next two paragraphs, older workers are confronted with functional changes, which call for congruent adaptations in their (interaction with their) work environment. The mechanisms underlying these associations are described in more detail in the paragraph on psychological theories on (successful) ageing at work. As workers have moved from an expectation of life-time employment towards a focus on the need to protect their employability (career potential) (Forrier and Sels 2003; Fugate et al. 2004; Van der Heijde and Van der Heijden 2006; Van der Heijden et al. 2009), there is an urgent scholarly need to better understand what elements add to *sustainable careers* for all workers (De Vos and Van der Heijden 2015). Building upon the earlier work on the changing nature of careers (e.g., Arthur et al. 1999), Van der Heijden and De Vos (2015) differentiate between four elements in the definition of careers—namely, the elements of time, social space, agency, and meaning.

As regards time, over the past decades, there have been substantial changes in this element of time. The combination of longer careers with less predictable, and in many cases, shorter-term career sequences calls for reconsidering the traditional notion of a career.

The disappearance of careers with a predictable length and order or sequences, which was more deterministic for individuals, has made room for more options and opportunities to shape one's career over time (Van der Heijden and De Vos 2015: 3). As regards social space, the amount of choices individuals have to make across life spheres has expanded, yet at the same time, we perceive an ever-increasing amount of unpredictability of career outcomes and a decrease in job security (Lee et al. 2011). That is to say, employees may perceive more career opportunities, however, in many cases at the risk of their career sustainability (Van der Heijden and De Vos 2015: 3). Agency, being the third element, requires the development of a set of career competencies (knowing how, knowing why, knowing whom; Arthur et al. 1995). At the same time, however, individuals are not as rational in their career decisions as an overly large emphasis on individual agency might suggest (De Vos 2013), and individual agency does not imply that other actors in the career field (organizations, institutions) no longer have any responsibility in terms of managing careers (De Vos and Gielens 2014a, b). Finally, as regards the meaning of a career, Van der Heijden and De Vos (2015) have argued that it is much more idiosyncratic than it used to be. In combination with the other three elements, in an increasingly unpredictable and complex world of work, individuals are viewed as the primary factor responsible for their own career and career success, in line with their subjective values. Obviously, underlying this new view on career success is that employability has become a core

element and a critical vehicle for attaining whatever type of subjective success criterion individuals might strive for (Van der Heijden and De Vos 2015: 4). This is the reason why we will not only present conceptualizations of, and studies on, (successful) ageing in general and at the workplace, we will also focus on the more individual-centred concept of active ageing.

In this chapter, we will therefore: (1) conceptualize successful ageing, active ageing, and ageing at work; (2) discuss psychological theories that can explain differences in age-related functioning across time; and (3) present HR policies and practices that can facilitate sustainable careers across the lifespan. We will start with conceptualizing (successful) ageing at work.

Conceptualizing Successful Ageing and Active Ageing at Work

Rowe and Kahn (1997: 433) have defined *successful ageing* as ‘low disease, high functional capacity and active engagement with life’. These authors stated that physical activity (known as an important aspect of good mental and physical health) contributes to at least one aspect of this triad: functional capacity. Although it has been a very influential paradigm in gerontology research (e.g., Cosco et al. 2013; Jeste et al. 2010; Zacher 2015a), this definition reflects a rather passive, deterministic (cause-and-effect), and outcome-oriented approach to ageing that is not completely in line with the multidimensional construct of ageing conceptualized above. If we follow Rowe and Kahn’s conceptualization, only those older individuals who are not ill or disabled and who are active can be deemed ‘successful’. According to their view, only a small proportion of older adults would be ageing successfully when set against these criteria. In a review of successful cognitive and emotional ageing studies by Jeste et al. (2010), the median percentage of people meeting these (objective or functional) criteria for successful ageing was 35 per cent, which was similar to that seen in the MacArthur Network on Successful Ageing (Berkman et al. 1993). Moreover, individuals with low physical health can still remain engaged at a higher age (e.g., Weir et al. 2010). These findings strengthen the characterization of successful ageing as a complex construct encompassing not only objective or functional criteria but also more subjective, psychosocial components. More specifically, both dimensions (i.e., objective and subjective) can coexist independently from each other within one ageing individual. To give a concrete example, Rudolph, De Lange, and Van der Heijden (2015), in their scholarly work on the adjustment processes in bridge employment, differentiate between objective (production/performance data, active work participation, and participation in bridgework itself)

and subjective (performance ratings, work engagement, work ability, and continuance intentions) indices of sustained work performance, and moreover, incorporate subjective success criteria as well (i.e., psychological success, well-being, life satisfaction, and perceived success).

In addition, nowadays, ageing individuals are increasingly perceived as (pro)actively responding to real-life challenges instead of passively reacting to stimuli. Although there is by no means one universally agreed definition of successful ageing, the existing definitions are all *multidimensional* in nature (e.g., physical, cognitive, emotional, and social functioning). A distinction can be made, however, between *objective* (i.e., emphasizing functional or physical capacities, such as lack of disease and disability, such as Rowe and Kahn (1997) proposed) and *subjective* (i.e., representing psychosocial processes such as attainment or maintenance of personal goals, positive attitudes towards the self, and social embedding) definitions of successful ageing (Jeste et al. 2010). With this multidimensional approach to successful ageing in mind, a paradigm shift from a traditional positivist-functionalism perspective to a social-constitutive perspective is needed (see Dannefer and Daub 2009).

The *criteria* for successful ageing that have been found in previous studies can be grouped into five categories (e.g., Bowling 2007 for a review): (1) biomedical or ‘health’; (2) broader biomedical functioning or health and social engagement; (3) social functioning; (4) psychological resources; and (5) lay indicators. The biomedical criterion has been measured in previous research by the following indicators: having diagnosed, chronic medical conditions (i.e., actual number reported), ability to perform activities of daily living, and psychiatric morbidity measured using the General Health Questionnaire-12 (GHQ-12; Goldberg and Williams 1988). The broader biomedical criterion has been operationalized with a comprised summing of the first criterion plus the number of different social activities one has engaged in during the past month, as an index of social engagement. Social functioning has been measured by a comprised summing of the number of different social activities one engaged in during the past month, the frequency of one’s social contacts, and the number of supporters. Psychological resources have been operationalized by self-efficacy, best optimism score, plus GHQ-12 items on sense of purpose (i.e., playing useful part, coping, and self-esteem). Finally, lay indicators that have been used in previous ageing research are, for example, gross annual income and perceived social capital.

If these five categories of factors form its main criteria, a formula for successful ageing has been proposed by Morgan (2006), who states that research evidence provides support for what has been called the ‘*use it or lose it*’ hypothesis. This hypothesis stresses that—in order to successfully age—one should stay active in multiple domains. More specifically, the following factors have

been associated with a reduced likelihood of intellectual decline: high levels of educational attainment, high occupational mental workload, linguistic skills, and regular intellectual stimulation (Morgan 2006: 82). However, since the previous paragraph has shown that successful ageing definitions focus on either objective (functional-physical) or subjective (psychosocial) success criteria, one could argue that there are two different types of outcomes that ask for two different approaches or recipes. Bowling and Iliffe (2011) examined whether baseline biological, psychological, and social approaches to successful ageing predicted future Quality of Life. They found that only the psychological approach to successful ageing independently predicted Quality of Life. Therefore, successful ageing is not just about maintaining one's physical health but also about maximizing one's psychological resources (e.g., self-efficacy and resilience) in order to improve or maintain one's Quality of Life. As the authors state: 'Increasing use of preventive care, better medical management of morbidity, and changing lifestyles in older people may have beneficial effects on health and longevity, but may not improve their Quality of Life. Adding years to life and life to years may require two distinct and different approaches, one physical and the other psychological' (Bowling and Iliffe 2011: 1).

Because of the increasing research attention for subjective (next to more objective) indicators or criteria of successful ageing—possibly resulting from the emergence of positive psychology (Seligman and Csikszentmihalyi 2000; Donaldson et al. 2011)—research interests now regularly focus on qualitative research methods and lay perspectives as well. Cosco et al. (2013) have recently performed a review and meta-ethnography on lay perspectives of successful ageing. They concluded that successful ageing is a complex construct pertaining to more than just physical health. Furthermore, psychosocial factors were the most frequently mentioned components of successful ageing in the qualitative studies of lay perspectives included in their review. One qualitative study in which 22 community-dwelling adults with a mean age of 80 years were interviewed (Reichstadt et al. 2010) reported two primary themes related to successful ageing: self-acceptance/self-contentment (e.g., realistic self-appraisal, a review of one's life, and focusing on the present) and engagement with life/self-growth (e.g., novel pursuits, giving to others, social interactions, and positive attitude). Concretely, striking a balance between these two constructs was critical and interventions that help individuals with this balancing act were perceived as relevant by the participants. More specifically, interventions that extend or maintain one's support systems and those pertaining to personally tailored information that may facilitate informed decisions and enhance one's coping strategies were deemed important.

This concept of striking a balance or being an active agent in responding to life challenges resonates with the construct of *active ageing*, also referred to as ‘positive ageing’ or ‘ageing well’, and is in line with the previously explained dimension of agency in the conceptualization of sustainable careers by Van der Heijden and De Vos (2015). This concept has been described as maximizing one’s own psychological resources (e.g., self-efficacy, resilience, humour etc.) or ‘keeping active’. In their study, Stenner, McFarquhar, and Bowling (2011) have performed a thematic decomposition of 42 transcribed interviews with British people aged 72 years and over. They found that active ageing is understood in relation to physical, cognitive, psychological, and social factors, but that these factors coexist in complex combinations. The notion of activity was expressed as keeping active or as avoiding becoming passive. In other words, agentic capacity or being able to respond to challenges is of vital importance in the ageing process, since ageing is indefinitely associated with loss of resources and functional capacity. As Stenner et al. (2011) stated: ‘The implication is that, regardless of chronological age, experiences of increasing passivity/diminishing activity may be associated with losing one’s vitality and hence feeling ‘old’. This process might be likened to a downward swerve in agentic capacities to affect and be affected by other people, circumstances and things’ (p. 475). Losing social support, for example, can be the start of a downwards swerve towards passively ‘giving up’, which may lead to a further loss of resources (e.g., losing additional parts of one’s support network).

After this conceptualization of ‘successful ageing’, we will now focus upon ‘successful ageing at work’, followed by an outline of psychological theories that explain differences in age-related functioning over time. *Ageing at work* can best be portrayed as a multidimensional process reflecting changes in biological, psychological, and social functioning over time (De Lange et al. 2006; Kooij et al. 2008). In defining older workers, Sterns and Doverspike (1989) proposed five different approaches composed of chronological, functional, psychosocial, organizational, and lifespan development. They described these approaches as follows: (1) *chronological* age refers to one’s calendar age; (2) *functional-* or performance-based age is based on a worker’s performance, and recognizes that there is a great variation in individual abilities and functioning through different ages. As chronological age increases, individuals go through various biological and psychological changes reflected in individuals’ health, psychical capacity, cognitive abilities, and performance; (3) *psychosocial* or subjective age is based on the self and the social perception of age. Subjective age (or self-perception) refers to how old an individual feels, looks, and acts, with which age cohort the individual identifies, and how old the person desires to be (Kalitera et al. 2002). The social perception of age involves age norms

applied to an individual with respect to an occupation, company, or society (e.g., stereotypes of older workers); (4) *organizational* age refers to the ageing of individuals in jobs and organizations, which is more commonly discussed in the literature on seniority and job or organizational tenure; and (5) the *lifespan* concept of age relates to behavioural changes at any point in the life cycle. Lifespan age can, for example, be measured by life stage or family status.

Subsequently, De Lange et al. (2006) translated these operationalizations into one overall figure highlighting relations between general ageing at work, underlying age operationalizations and more specific age-related factors (see Fig. 4.1). Kooij, De Lange, Jansen, and Dikkers (2008) conducted a review of 24 empirical and nine conceptual studies on the distinguished age operationalizations (using different age measures) in relation to work motivation, and found that most of these age-related factors can have a negative impact on the motivation of older people to continue to work. From a practical or professional vantage point, these age-related factors (e.g., declining health) should, therefore, be addressed by HR policies and practices such as ergonomic adjustments which could facilitate older workers (their motivation) to continue to work. And although this review indicates that various age-related factors are important in understanding older workers' motivation to continue to work, the authors recognize that the processes underlying the association of these age-related factors with the motivation to continue to work are still largely uncharted territory.

In an attempt to summarize the aforementioned conceptualizations and operationalizations of successful ageing (at work), Table 4.1 comprises several measures or indicators which tap into the concepts of successful, active, and work-related ageing.

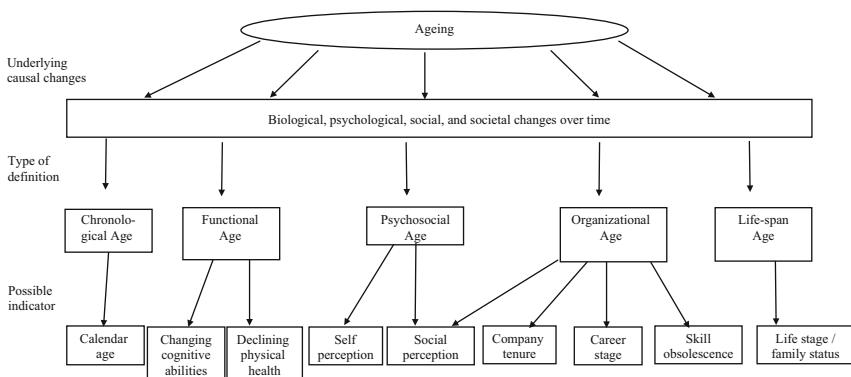


Fig. 4.1 A multidimensional conceptualization of ageing and possible indicators (Kooij et al. 2008, based upon De Lange et al. 2006, p. 7)

Table 4.1 Possible indicators of successful, active, and work-related ageing

Ageing sub-concept	Possible indicators
Successful ageing	Quality of Life, biomedical or functional 'health' measures (e.g., diagnosed medical conditions, and parts of the General Health Questionnaire-12), social functioning (e.g., the number and frequency of one's social contacts), psychological resources (e.g., self-efficacy and best optimism), and lay indicators (e.g., gross annual income and perceived social capital)
Active ageing	Physical and mental reserves, self-efficacy, resilience, and agentic capacity
Work-related ageing	Job tenure, occupational time perspective, and skill obsolescence (e.g., Rudolph et al. 2015)

In sum, although these conceptualizations are crucial for getting a grasp on what the constructs of successful ageing, active ageing, and work-related ageing mean, they do not provide unequivocal insights in the causal nature of the aforementioned relations and possible theoretical explanations for the relations found in previous studies (e.g., Kooij et al. 2008). In the following sections, we will, therefore, address in more detail relevant lifespan developmental psychological theories that can further explain relations between (successful) ageing and sustainable careers.

Psychological Theories on (Successful) Ageing at Work

During the last decades, *lifespan theories* have moved away from unilateral perceptions of age towards more complex and dynamic conceptualizations of the ageing process. The lifespan theory of Selection Optimization and Compensation (SOC) (Baltes et al. 1999) and Socio-emotional Selectivity Theory (SST) (Carstensen 1995, 2006), for example, explain how goals change over the lifespan. *SOC theory* (Baltes et al. 1999; Kooij et al. 2014) states that people maximize the gains and minimize the losses they experience over time by using different strategies. To maximize gains, people select desirable outcomes or goals (i.e., elective selection) and optimize their resources to reach these desirable outcomes. To minimize losses, people select fewer goals in response to these actual or impending losses and compensate for these losses by investing their remaining resources in counteracting these losses. By employing these strategies, individuals strive to achieve three different lifespan goals: growth (i.e., reaching higher levels of functioning), maintenance

(i.e., maintaining current levels of functioning or returning to previous levels of functioning), and regulation of loss (i.e., functioning adequately at lower levels).

SOC theory further proposes that the allocation of resources aimed at growth will decrease with age, whereas the allocation of resources used for the maintenance and regulation of loss will increase with age (Baltes et al. 1999). In a study by Freund (2006), regulatory focus was found to shift from emphasizing promotion in young adulthood to focusing on maintenance and prevention in later adulthood. In a similar vein, the *Socio-emotional Selectivity Theory* (SST; Carstensen 1995, 2006) proposes that age-related changes in the perception of time result in changes in social goals or motives, thereby shifting the motive for social interaction from gaining resources (i.e., instrumental) towards receiving affective rewards (i.e., emotional) and strengthening one's identity. Whereas instrumental goals involve knowledge acquisition, autonomy, social acceptance, and status attainment, emotionally meaningful goals involve generativity, emotional intimacy, and feelings of social embeddedness (Lang and Carstensen 2002; Kooij et al. 2014).

The *Lifespan Theory of Control* (Heckhausen et al. 2010) builds upon these two theories by addressing how individuals actively choose goals in accordance with the principles of developmental optimization. It proposes greater reliance on secondary control strategies with ageing to keep striving for the maximization of primary control that reflects one's ability to influence important outcomes in one's environment. Secondary control strategies, which address internal motivational processes in order to minimize losses in levels of primary control, are needed when the original goal has become unattainable. They can also help to minimize further losses and maintain current levels of functioning, or expand primary control. An individual could, for example, as his/her functional capacities decrease with age change his/her preferences from extrinsically rewarding (e.g., striving for a job promotion) to intrinsically rewarding job features (e.g., accumulating one's expertise; Kanfer and Ackerman 2004).

Two additional psychological theories that bring the ageing process to the work context are environment-fit theory and job crafting. As mentioned above, *Person-Environment (PE) fit* (Kristof-Brown et al. 2005; Lawton and Nahemow 1973) is frequently described as the compatibility between a person and his or her surrounding environment which occurs when their characteristics match. Nested with PE fit are the sub-concepts of Person-Job (PJ) fit, Person-Group (PG) fit, Person-Organization (PO) fit, and Person-Supervisor (PS) fit (e.g., Kristof-Brown et al. 2005). Since—as described earlier—functional capacity declines with age, which has implications for one's (mis)match

with the work environment, PE theory (including these four sub-types) is a relevant perspective when considering ageing in the workplace. *Job crafting* is a more specific construct, which is defined as ‘the physical and cognitive changes individuals make in the task or relational boundaries of their work’ (Wrzesniewski and Dutton 2001: 179). Usually, these changes are made in order to make one’s job more meaningful, engaging, and satisfying (e.g., Demerouti 2014).

In sum, conceptualizations of successful ageing have moved from unilateral, functional-objective and passive characteristics to multidimensional, psychosocial-subjective, and dynamic features. Furthermore, lifespan theories assume that as individuals age, they will increasingly focus on intrinsic, maintenance-related and socio-emotional goals and they will reduce their attempts to strive for extrinsic, growth-related or instrumental goals by using selection, optimization, and compensation tactics and—in general—relying more on secondary as opposed to primary control strategies. In the work context, a lack of fit between an individual and his/her work environment may lead to job-crafting efforts, which are associated with SOC strategies.

When all the psychological theories and perspectives discussed above are related to the contemporary notion of *sustainable careers*, one could claim that there is room for compensatory strategies while successfully ageing at work. In line with SOC theory (Baltes et al. 1999) and the Lifespan Theory of Control (Heckhausen et al. 2010), accumulated knowledge and experience can continue to make strong and supportive contributions to our intellectual performance throughout life, even when faced with a decrease in physical or cognitive capacities. By ‘active ageing at work’, individuals can maximize or relocate their personal resources or those of their environment in order to compensate for (actual or anticipated) losses. In this manner, their PE fit will be maintained or increased.

Therefore—and in line with recent psychological health models such as the Job Demands-Resources Theory (Bakker and Demerouti 2007)—we first propose a more general *dual-process theory of successful ageing*, wherein one route relates physical activity to functional capacity or physical health and a second path is composed of active ageing in association to engagement or Quality of Life (see Fig. 4.2). Sustained physical activity will lead to increased levels of functional capacity (i.e., the objective, physical-functional route). In addition, ageing individuals who keep active in spite of (or in response to) the challenges that life throws at them will be more engaged, and are expected to have higher Quality of Life, than those with more passive behaviour (i.e., the subjective, psychosocial route). Both types of relationships are expected to be moderated by personal resources (e.g., resilience and self-efficacy) and

Context (societal, organizational, and personal)

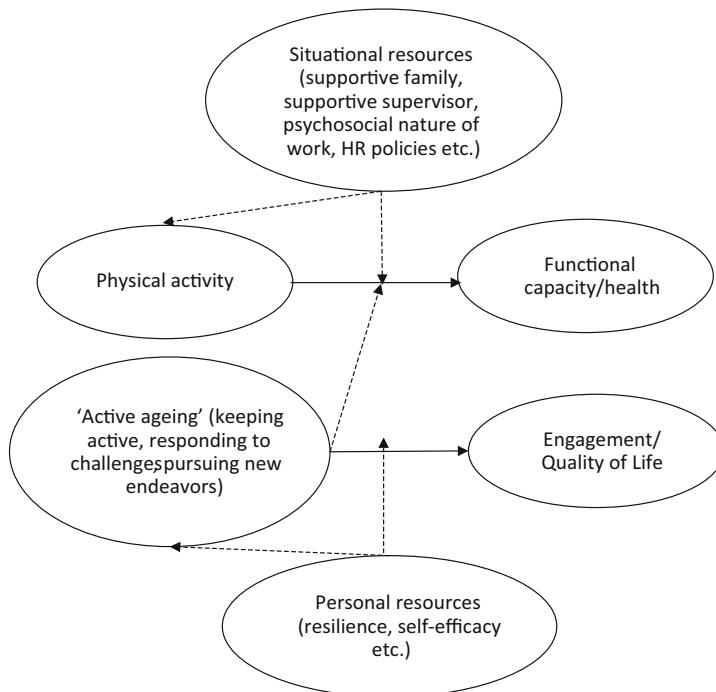


Fig. 4.2 A dual-process model of successful ageing

situational resources (e.g., family support, supervisor support, and HR policies). In cases where an older individual has high self-efficacy, for example, he or she will probably feel more confident in responding adequately to critical life events, and will thereby feel more engaged or vital. Naturally, the (socio-political, organizational and personal) context or situation of the ageing individual will impact these associations as well.

Similarly, Van der Heijden and De Vos (2015) stress the importance of social space, being one of the four dimensions of sustainable careers' research and practice, and argue that as a career refers to the movement of a person through social space as well, careers cannot be studied without considering the context with which they are inherently connected. In particular, if an individual lives in a country with extensive governmental policies that facilitate older people, for example, his/her possibilities for active ageing and compensatory strategies will be higher compared to those residing in countries with fewer old-age policies. The impact of the broader context in which the ageing individual finds himself or herself (see also Zacher 2015b) is exemplified by cross-cultural studies of successful ageing (e.g., Tan et al. 2010; Ranziijn 2010).

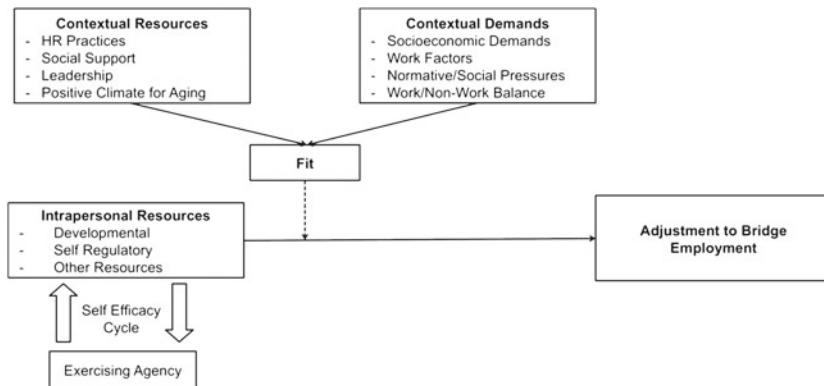


Fig. 4.3 A model of adjustment to bridge employment (Note: Dashed lined indicates a conditional (i.e., moderated) effect)

In a similar vein, Rudolph, De Lange, and Van der Heijden (2015) in their work on the *psychological adjustment process for bridge employees* crafted a work-related model that considers the influence of both contextual resources (HR practices, social support, leadership, social climate for ageing) and demands (socio-economic demands, work factors, normative/social pressures, work-home balance), and intrapersonal resources (e.g., developmental, self-regulatory, and other resources; see Fig. 4.3). They conceptualized that intrapersonal resources are the primary antecedents of adjustment to bridge employment, and argued, in line with Heckhausen's concept of primary and secondary control strategies (e.g., Heckhausen et al. 2010; Heckhausen and Schulz 1995) and demands-resources perspectives (e.g., Bakker and Demerouti 2007), that the degree of fit between contextual factors and demands has a conditional influence on the relationship between intrapersonal resources and adjustment. More specifically, under conditions of positive fit, individuals are less likely to rely on intrapersonal resources in order to adjust to bridge employment. However, in case of a lack of fit between contextual factors and demands, intrapersonal resources are more likely to drive adjustment processes (see Rudolph et al. 2015, for more detailed information).

HR Policies Facilitating Successful Ageing in the Workplace

In line with the assumptions of the SOC model (Baltes et al. 1999), Kanfer and Ackerman (2004) argued that losses in old age will result in motivational interventions aimed at slowing performance decline, causing older

workers' goal focus to shift from promotion to prevention. As a result, growth motives are likely to decrease with age, whereas motives for maintenance and security are likely to increase as workers age. This is supported by Kooij, De Lange, Jansen, Kanfer, and Dikkers (2011) who found that security motives increase with age (among certain subgroups) and that growth motives decrease with age.

This may affect the effectiveness of HR policies aimed at facilitating older workers' motivation to (continue to) work. As Kooij and colleagues have proposed (2013) and found (2014) in their mixed-methods study, HR practices for ageing workers can be categorized in four central bundles: (1) *development* HR practices, which are practices that help individual workers to reach higher levels of functioning (e.g., training); (2) *maintenance* HR practices, which help individual workers to maintain their current levels of functioning in the face of new challenges (e.g., flexible work schedules); (3) *utilization* HR practices, which are practices that help individual workers to return to previous levels of functioning after a loss by removing job demands that have become unachievable for an employee from the job and replacing them with other demands that utilize already existing, but not yet necessarily applied, individual resources (e.g., lateral job movement); and (4) *accommodative* HR practices, which organize adequate functioning at lower levels when maintenance or recovery is no longer possible (e.g., less physically demanding posts). More recent empirical evidence supporting these bundles or categorizations of HR practices has been found by Veth et al. (2015).

Since lifespan theories and studies demonstrate a shift in goal focus with age, Kooij et al. (2014) expect that development HR practices become less important, and that maintenance, utilization, and accommodative HR practices become more important for older workers in general. As Townsend (2007) has suggested, however, certain (social) policies may foster the sense of 'being old' that is associated with the previously mentioned 'downward swerve' in agentic capacities. This could refer to the accommodative practices proposed by Kooij et al. (2014).

On another note—as the conceptualization of work and retirement continues to evolve—the Protean Career emphasizes the role of self-management in a shifting work environment (Hall 1976, 2004). This encompasses greater responsibility to the individual for learning and mastering skills, as well as adapting to the changing work environment (Hall and Mirvis 1995). A protean career is initiated and sustained by the employee rather than the employer. Individuals are thereby able to shape their own careers. New management constructs such as job crafting (Wrzesniewski and Dutton 2001) or 'I-deals' (i.e., idiosyncratic deals or tailor-made agreements that may facilitate sustainability

at work; Rousseau 2005) are concrete exemplifications of this development. Career self-management and career lifelong education become critical tools for the protean concept that seem ideally suited to the current world of work and can be an asset to individuals and to organizations. For the individual, career self-management affords the flexibility to develop a career path that best fits with individual needs, whether they be financial, family-related, or related to individual development and stage of life. A self-determined approach can lead to personal satisfaction and better person-job fit.

As the workforce ages, workers will be forced to accept protean careers and reject the traditional views of security in employment. Sterns and Subich (2002) highlight the importance of mobility in career development, suggesting that individuals who self-manage their careers may be more proactive in searching for opportunities outside the company. For the individual, a few positive effects that come along with self-managing a career may be composed of more flexible job opportunities, the option to leave a company at will, and the ability to foster and present a person's specific talents (Hall and Mirvis 1995). Obviously, with self-management, individuals are enabled to enhance the meaning of their career (being the fourth dimension in the research on sustainable careers; Van der Heijden and De Vos (2015)), in terms of the value of specific career outcomes, as well detailed by Arthur et al. (1999) when describing the evolution of careers from 'means of earning to means of learning' (Van der Heijden and De Vos 2015: 1).

An Integrative Perspective

De Lange et al. (2015) have recently presented a review on relations between HRM and sustainability across the lifespan and argued that an integrative perspective is needed to fully address the impact of (successful) ageing at work (see Fig. 4.4), and that may trigger further scholarly work in the career field. The authors argued that both employers' as well as employees' work-related objectives concerning current and future work should be fine-tuned in order to enable sustainable careers. In order to do so, they proposed a lifespan aware and diversity-friendly HRM perspective to diagnose what employees need, in terms of specific HR practices, across career and life stages. Given the increasing diversity of the labour market, in the lifespan trajectories of workers as well as in the (changing) content of their work, De Lange et al. (2015) stressed that HRM departments and research should critically examine worker inclusiveness and invest in prevention, curation as well as amplition types of HR practices to protect the sustainability of careers of all categories of workers.

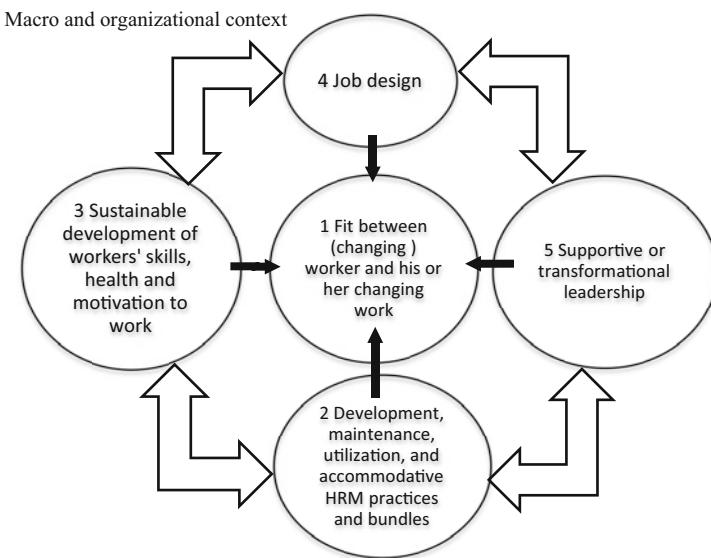


Fig. 4.4 An integrative perspective on sustainability at work across the lifespan (based on De Lange et al. 2015)

This model integrates both key principles originating from the psychological lifespan theories discussed above (e.g., P-E fit, SOC strategies) and a more practical, professional perspective on employability or sustainability across employees' careers. Moreover, fit between the micro (i.e., individual employees and supervisors), meso (i.e., job level and HR practices), and macro (i.e., organizational context) levels is crucial in this process-oriented and integrative perspective to sustainability across the lifespan. This brings us back to the point raised earlier in this chapter when conceptualizing successful and active ageing (e.g., (Reichstadt et al. 2010): ageing individuals constantly have to respond to challenges at work and in their life in general and—in doing so—they are striking a balance between self-acceptance or contentment with one's current situation versus engagement or growth. Interventions that help individuals extend or maintain their support systems (e.g., knowledge transfer programs) and that pertain to personally tailored information, thereby facilitating informed decisions and enhancing one's coping strategies (e.g., flexible benefits), should be offered by organizations through their HR practices and discussed by employees and their supervisors in an ongoing dialogue in order to facilitate this balancing act. In line with the integrative fit perspective (Fig. 4.4), this requires mutual effort and commitment from employees and employers with consideration of their mutual context.

Conclusions and Recommendations

This chapter has attempted to give an overview of: (1) the concepts of (successful) ageing, active ageing, and ageing at work, (2) psychological theories that can explain differences in age-related functioning across time, and (3) HR policies and practices that may facilitate sustainable careers across the lifespan. Successful ageing can be perceived as a *multidimensional* concept by nature, including both objective (e.g., emphasizing functional or physical capacities, such as lack of disease and disability) and subjective (e.g., representing psychosocial processes such as attainment or maintenance of personal goals, positive attitudes towards the self, and social embedding) elements or indicators. Active ageing refers to maximizing one's own psychological resources (e.g., self-efficacy and agency) or keeping active. Finally, we described that ageing itself is also a multidimensional concept that cannot be solely operationalized by calendar age; rather, it encompasses all changes in biological, psychosocial, organizational, and societal functioning.

Most psychological theories or theoretical mechanisms with regard to the ageing worker are based on the concept of (increasing one's) *balance or fit*. Balance between self-acceptance and growth (e.g., active ageing), and the (mis)fit of changing functional capacities or resources (e.g., biological losses) are observed as one gets older with one's contextual demands (e.g., work pressure, flexible workplaces) and resources (e.g., HR practices, social support, and supportive leadership). A theoretical framework integrating these psychological perspectives on ageing individuals in a work environment is given in Fig. 4.4, and may be used as a general research agenda for studying the degree to which ageing workers fit their work contexts.

From a theoretical standpoint—as the changes with regard to time, social space, agency, and meaning (see De Vos and Van der Heijden 2015) have important implications for careers, the practice of career management, and the field of career studies—the perspective of ‘sustainability’ ought to be added to contemporary scholarly research on careers. Adding a sustainability perspective to empirical work on careers would provide a more nuanced picture of how actors within different contexts (e.g., in one's working organization, one's broader life sphere, and in the broader societal context) interact with one another, have their impact on careers, and can affect the sustainability of careers over time (see Van der Heijden and De Vos 2015).

More practically, we would like to point to the dual responsibility of: (1) older workers themselves in being an active agent investing in increasing their employability and thereby reducing the risk of their knowledge and skills becoming obsolete (e.g., by investing in their ongoing development and by

engaging in job crafting), and (2) employers, HR professionals, and direct supervisors in actively supporting their ageing workers in these efforts to stay or become more employable (e.g., by offering accommodative, maintenance, utilization, and development HR practices).

In sum, although older workers (and younger workers alike) are important actors in adapting themselves to a rapidly changing work environment, all parties involved in their work context should try to facilitate them in this ongoing attempt by offering congruent (bundles of) HR practices, ensuring supportive leadership, and possibilities for job (re)design. This is a dynamic process involving many stakeholders that may lead to PE misfit and subsequent adaptation efforts (see Zacher 2015b). In case the contextual and personal factors mentioned above are aligned, however, optimal levels of PE fit may be achieved, which may eventually lead to successful, highly employable ageing workers who are engaged, healthy, and productive.

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5

Age, Generations, and the Labour Market

Peter Urwin and Emma Parry

Introduction

Most economies, at a stage in their post-industrial development, experience an increase in the proportion of older individuals within the population, as birth rates fall and longevity improves. Across 27 members of the European Union (the ‘EU-27’), there will be a substantial decline in the proportion of individuals aged between 15 and 64, from 67 per cent in 2010 to 56 per cent in 2060. The population ageing that drives much of this change will be particularly acute up to 2030, with the proportion of individuals aged 65 and over rising from 17 per cent in 2010 to 26 per cent in 2030, but then only increasing to 29.5 per cent up to 2060 (European Commission 2014). In the USA, between 2012 and 2050, the population aged 65 and over is projected to almost double, from 43 million to 84 million (Ortman et al. 2014).

This study utilises data from the Labour Force Survey (LFS). The LFS is distributed by the Economic and Social Data Service; Crown Copyright material is reproduced with the permission of the Controller of HMSO and the Queen’s Printer for Scotland.

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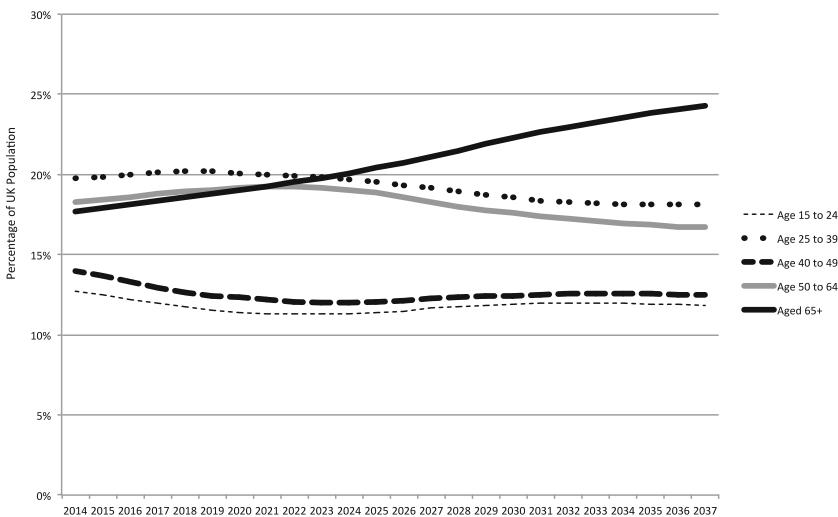


Fig. 5.1 The changing age of the UK population, 2014–2037 (Source: Chart created using 2012-based subnational population projections, Office for National Statistics (May 2014))

Figure 5.1 describes projected changes in the UK's age distribution between 2014 and 2037, according to figures produced by the Office for National Statistics.¹ As we can see from Fig. 5.1, over the next 20-plus years, there will be an increase from 17.5 per cent to 24 per cent in the proportion of individuals aged 65+ in the UK population—with an offsetting fall in proportions spread relatively evenly across all other age groups.

These projections take into account a variety of factors (immigration, birth rates, death rates, fertility, etc.), but growth in the proportion of those aged over 65 mainly reflects the continued impact of the post-war baby boom. As we shall see in the following sections, when analysing Labour Force Survey (LFS) data, between 1989 and 2014, the UK saw an increase in the numbers aged between 50 and 64 of around 2.6 million—growth that will peak around 2021, according to Fig. 5.1. The concern is now that this ‘bulge’ in the population that boosted the number of older workers (50–64) will now result in a large increase in the number of older retirees (aged 65+), and this will have substantial economic impacts.

In the UK, as elsewhere, the majority of funding to support public spending involves a transfer of income from productive activity (from employees or firms) to those who do not engage in production (the economically inactive), via taxation. If we observe an increase in the proportion of older people in the

¹ See Department for Communities and Local Government (2015), ‘2012-based Household Projections: England, 2012–2037’, National Statistics, *Housing Statistical Release*, 27 February.

population, the implication is that there will be fewer workers to provide tax revenues to sustain existing levels of public funding. In addition, underpinning the growing proportion of those aged over 65 as shown in Fig. 5.1 is a projected increase in the proportion of ‘very old’ we see in the population. The increase of 6.5 percentage points (ppt) (from 17.5 per cent to 24 per cent) mentioned above is driven by a 1.5 percentage point (ppt) increase in those aged 65–74, a 2.5 ppt increase in those aged 75–84 and a 2.5 ppt increase in those aged over 85.

One of the main concerns for government is the extent to which this ageing of the population is fiscally sustainable under present funding arrangements. The concern is that there will be: (i) fewer workers to sustain existing levels of spending, and (ii) that the level of spending required will actually increase because pension arrangements, health spending and long-term care for the ‘very old’ will increase (see, for instance, Dilnot 2012).

This is not a new phenomenon, and over the last 20 years, the UK has gone some way to reduce the expected impact of ageing populations, by altering some of the mechanisms that underpin transfers from younger workers to older individuals. Most notable have been the changes to pension arrangements, with a general move away from defined benefit, towards defined contribution, schemes,² and reductions in the generosity of the Basic State Pension (BSP).³

For a number of decades now, the UK has moved away from the assumption that pensions receive an indirect payment from the existing younger generation, towards the idea that they save enough while working to ensure an adequate rate of return on investments when they retire (see, for instance, Dilnot et al. 1994). In the UK, this has sparked a debate over generational fairness, as there is an implied change in the proportion of government spending received by younger and older generations in the population (see, for instance, Willetts 2010). Such a ‘struggle for resource’ is central to the concept of generational difference, as expounded by sociologists such as Edmunds and Turner (2002)⁴; and despite the historical changes that have been made, there

² Defined contribution schemes are those that define the amount an individual saves, and then the level of pension payment depends on the return that is secured from investment of these savings; Defined benefit schemes define the level of pension payment, often on the final or career average salary of the individual.

³ There have been various government policies since the 1980s that have been associated with this move towards less generous pension entitlements, and away from final salary schemes. For instance, in 1980, the Conservative government of Margaret Thatcher moved indexation of the Basic State Pension from earnings to prices. As a result, the value of this benefit fell by 40 per cent relative to earnings, over the next three decades (Bozio et al. 2010). In 1997, Gordon Brown abolished the tax relief that pension funds earned on dividends from investments in the stock market, pushing many funds into the red and accentuating the decline in defined benefit occupational pension schemes.

⁴ See Parry and Urwin (2009, 2010, 2011) for more detail.

are still questions over whether we can afford to sustain existing arrangements as the population ages further over the next 20 years.⁵ In this chapter, we consider these issues of age and generation, and in looking back at the experiences of older and younger workers in recent decades, we attempt to shed some light on possible future economic impacts.

Older Worker Economic Activity Rates, 1951–2014

A key issue associated with ageing populations is the concern over economic activity rates. As individuals age, the probability that we observe them being economically active falls—the implication is that, as the population ages, we have a growing number of economically inactive individuals and the dependency ratio increases to a point where it becomes unsustainable.⁶ Here, we analyse *Quarterly Labour Force Survey* (QLFS) data across two decades to consider how rates of economic activity have evolved over the last six decades among older age groups, and what this might imply for future activity rates.

From the late 1950s, many countries of the Organisation for Economic Co-operation and Development (OECD) witnessed an increase in the proportion of inactive older individuals. As with ageing populations, but to a lesser extent, falling economic activity rates are associated with the process of development. If leisure is a normal good, rising real incomes are likely to lead individuals to consume more leisure, and therefore, spend less of their life working (in terms of both their average working week and also, on average, over their lifetimes). The development of a welfare state, which provides for a citizen's retirement, will also allow earlier exit from the labour market. This may explain some of the fall in economic activity for males over the age of 55 since the 1950s, seen in Fig. 5.2.

However, much of the fall in economic activity seems due to the large amount of restructuring that the UK economy underwent from the mid-1970s, and here, there is a very clear difference between the experience of older men and that of older women. We need to be careful in interpreting Fig. 5.2, as between 1951 and 1990, we have very few data points, so the figure is rather 'scrunched up' on the left-hand side—however, even taking this into

⁵ See for instance, the *Johnson* (2014) report, which warns of a projected deficit in the National Insurance Fund, which is used to pay benefits, including the state pension.

⁶ Economic Activity covers those who are employed or unemployed (seeking and available for work). As we shall see, the dependency ratio is commonly considered as the number of working age, divided by the number of state pension age. However, we argue for a more general measure that considers the number of working age, divided by the number who are not economically active (whether or not they are of state pension age).

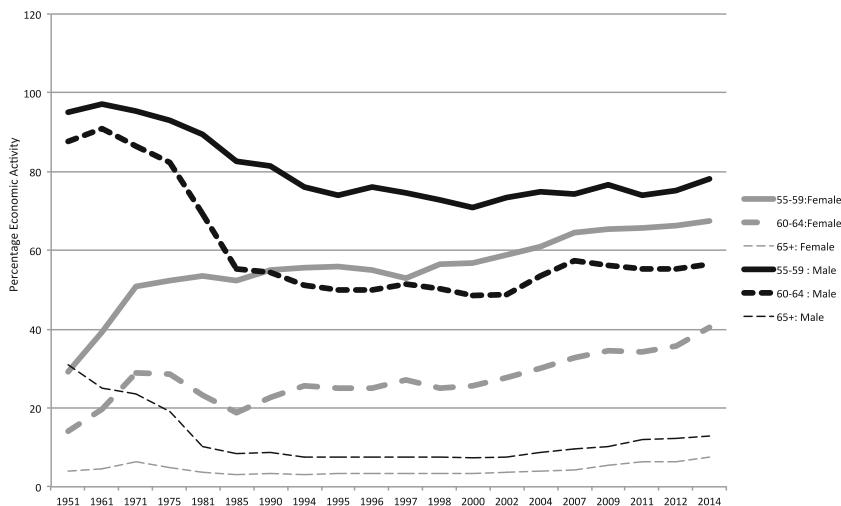


Fig. 5.2 Older worker economic activity rates in Great Britain: 1951–2014 (The figures in Fig. 4.2 do not include Northern Ireland) (Source: *Employment Gazette*, April 1995, and April to June Quarterly Labour Force Survey(s), 1995–2014)

account, we can see that there is quite a precipitous fall in the economic activity rates of men aged 60–64 (from 88 per cent to 55 per cent) and men aged over 65 (from 31 per cent to 9 per cent), between 1971 and 1985. For men aged between 55 and 59, the bulk of decline in activity rates is spread over a longer time period, from 95 per cent in 1971 to 74 per cent in 1995, before we see relative stability in the activity rate for this age group.

What we observe in Fig. 5.2 is a *Generation* of men bearing the brunt of severe structural adjustment during the 1970s and 1980s, as the UK economy moved away from heavy industry towards service-sector employment. This generation of men found themselves with obsolete skills and few opportunities for retraining—a situation that was accentuated by the extensive use of early retirement and voluntary redundancy schemes in sectors where labour force reductions occurred (Urwin 2004).

For instance, the proportion of employment accounted for by the manufacturing sector in the UK fell from 31.5 per cent in 1979 to 20 per cent in 1994, while over the same period, the banking and finance sector saw its share of employment rise from 7 per cent to 12.5 per cent (Pryce et al. 2015). Arguably, these changes to industrial structure were inevitable, as increased international competition, technological change and a greater emphasis on markets to determine the allocation of resources continued to shift the comparative advantage of the UK economy. However, the Thatcher administrations of the 1980s introduced policies that reduced union power, deregulated

markets and privatised the nationalised industries, ‘super-charging’ this process of change. This caused painful social upheavals, as we moved from approximately 200,000 miners in the early 1980s to less than 10,000 today, from a situation where one in four jobs were in manufacturing to a situation of one in ten today, and to a position where most of the nationalised industries have been transferred to private ownership.

Figure 5.2 suggests that a generation of older women also suffered some relative decline, or stagnation, in activity rates during this period (following significant growth in older women’s activity rates from the end of the Second World War). However, between 1985 and 2014, we see successive generations of older women increasing their rates of economic activity—from 52 per cent to 67 per cent among those aged 55–59, from 19 per cent to 41 per cent for those aged 60 to 64 and from 3 per cent to 8 per cent for those aged over 65. In contrast, it is only recently that older men in Fig. 5.2 have recovered the activity rates seen among earlier generations at the end of the 1980s and the beginning of the 1990s.

As we have already suggested, during this period of increasing activity rates for women and recovery of rates for men, the absolute number of older individuals in the population increased substantially, making even the ‘recovery’ of economic activity rates for men more encouraging than may at first seem. We have already pointed out that between 1989 and 2014, our category of individuals aged between 50 and 64 increased by approximately 2.6 million, and during the same period, we see 2.4 million extra individuals in the over 65 category.

Clearly, this is a ‘cup half full – cup half empty’ issue, as the increase in activity rates has not been enough to fully offset the increase in older individuals among the population, and therefore, over this period, the absolute number of inactive older workers also increased. However, it is encouraging that the increase in activity rates has continued throughout the recession (apart from an apparent minor negative impact on men aged 60–64). When considering economic activity rates, Fig. 5.2 suggests that in the absence of a substantial structural economic shock, we may expect activity rates to show continued improvement—especially if the generation of 50–64-year-olds who we see in Fig. 5.2, continue to have higher activity rates as they constitute a growing proportion of the projected over-65 cohort in Fig. 5.1.

We return to this issue later in our discussions, when considering the ‘push’ and ‘pull’ factors that may have contributed to this rise in activity rates among older individuals. However, it is worth noting that in the current recession, there have been concerns raised over the extent to which higher-than-expected levels of employment have been driven by part-time working. While we may

be concerned over growth in the proportion of individuals who have been forced (or ‘pushed’) to take on part-time working, when they would prefer a full-time job, this would seem less of a concern when considering those aged over 65.⁷ The continued availability of part-time work during the recession may explain some of the continued improvement in activity among older age groups. This is particularly the case among older women, where we see 84 per cent of women aged over 65 working part-time. Similarly, 56 per cent of men aged over 65, who are in employment, work part-time.

In our consideration of economic activity rates, we have some potential good news for the future, even though any continued increase in older worker activity rates is unlikely to fully offset the ageing of the population. However, we need to remember that increased levels of *Economic Activity* do not necessarily reflect increased level of *Employment*—a rising number of older workers moving from *Inactivity* to *Unemployment* would boost *Economic Activity*. More importantly, our ‘Introduction’ section highlights the potential for generational conflict—we need to consider the employment situation of older, relative to younger, individuals if we are to assess the validity of arguments that one generation may be benefiting at the expense of another.

To this end, the following section compares and contrasts the changing age distribution of the workforce (and therefore the implied age distribution of those leaving the workforce) as we entered the most recent recession (with unemployment rising from February 2008), with that seen in the previous recession (with unemployment rising from mid-1990). The simple question is whether, using Labour Force Survey data, we can see any pronounced differences between past and present recessions, and what this implies for those of different generations.

Age and Employment in the 1990 and 2008 Recessions

The most recent recession (defined as two or more consecutive quarters of negative gross domestic product (GDP) growth) began in the early-to-mid-2008, with unemployment rising from February 2008. The previous substantial downturn took place in the early 1990s, and in the third and fourth quarters of 1990, we experienced negative GDP growth (with unemployment rising from around April 1990). Analysis of Labour Force Survey data allows us to

⁷ For a discussion, see Pryce, V., Ross, A. and Urwin, P. (2015), *It's the Economy Stupid: Economics for Voters*, Biteback Publishing Ltd.; 371 pages.

consider broad trends in employment across older and younger age groups before, during and four years after the start of each downturn. That is,

- For the most recent recession, we analyse five periods. We are able to create a comparable series of figures from five of the Quarterly Labour Force Surveys (QLFS). We start with the April–June 2007 LFS (one year before the rise in unemployment), then the April–June 2008 LFS (the point at which unemployment started to rise) and finally, the April–June 2009, 2010 and 2011 surveys.
- For the early 1990s recession, we consider the *Annual UK LFS* data for 1989 (the year before unemployment began to rise), 1990 (the year unemployment began to rise) and 1991. Unfortunately, from 1992 onwards, the nature of the LFS changed to a quarterly study, but we have analysed figures using the 1992 QLFS and 1993 QLFS to see how the previous recession progressed.

Before considering Table 5.1, it is important to note some limitations of our study. For each age group, we are considering all members of the cohort and therefore any change in the number of individuals in employment, unemployment or inactivity could be a result of the following:

- (a) Movements of individuals within the same cohort between the labour market states of inactivity, unemployment and employment.
- (b) Movement of individuals from younger cohorts into older age cohorts, as employed, unemployed or inactive individuals.
- (c) It is also important to note that these overall figures could be broken down into inflows and outflows (between employment, unemployment

Table 5.1 Change in numbers and proportions 1989–1991 by age

	Aged 16–25	Aged 26–39	Aged 40–49	Aged 50–64	Aged 65+
Employed	−661,817	123,872	230,904	−37,212	−16,019
	−6.3	−1.2	0.0	0.3	−4.6
Unemployed	161,367	124,558	53,538	2481	−8889
	30.7	16.7	14.1	1.7	−28.2
Inactive	96,825	52,785	1818	−54,206	108,499
	11.0	0.2	−3.8	−0.6	0.4
Absolute change in overall cohort size	−403,625	301,215	286,260	−88,937	83,591
Per cent change in overall cohort size	−4.8	2.7	4.0	−1.0	1.0

and inactivity OR between age cohorts), but in our analysis, we are only considering the ‘stock’ of individuals in these labour market states.

To see what we mean, consider the top left-hand cell of Table 5.1, which suggests that between 1989 and 1991 (a year before and a year after the start of recession), we see the number of 16–25-year-olds in employment drop by approximately 662,000. This represents a fall in the proportion of 16–25-year-olds in employment, from 72.3 per cent in 1989 to 67.7 per cent in 1991—a 4.6 percentage point (ppt) fall, which translates into a 6.3 per cent fall. The fact that the proportion of 16–25-year-olds in employment fell by 6.3 per cent suggests that this 662,000 fall was partly driven by the movement of individuals within this cohort from the state of ‘employed’ to ‘unemployed’ and ‘inactive’, following the onset of recession ((point a) above).

However, we can also see that during this period, the cell that sets out the *absolute change in overall cohort size* suggests that there were approximately 404,000 less 16–25-year-olds in 1991 than there had been in 1989—during this time, many 16–25-year-olds moved up into the 26–39 age group (which grew by 301,000 during the same period), and the number of individuals aged below 16 who joined the 16–25 age group was not large enough to compensate. A substantial proportion of the 662,000 fall in the stock of employed 16–25-year-olds between this time is therefore due to a fall in the overall size of the 16–25 cohort.⁸

This description of Table 5.1 provides some indication of the strengths and weaknesses of our analysis of LFS data, and the strength is very much in our ability to compare the fortunes of each age group as the recession progresses. Even accounting for the (sometimes quite large) absolute changes in the size of our age cohorts, it is clear that in the early stages of the 1990s recession, those aged 16–25 bore the brunt of labour force reductions—with the rise in unemployment of approximately 125,000 among those aged 26–39 mainly concentrated among the younger members of this age group. Among those aged 40–49 and 50–64, we see virtually no change in the proportion of the cohort in employment, and relatively small increases in the proportions of unemployed. For those aged over 65, we see a reduction in the numbers of employed and unemployed, and an increase in inactivity, as the recession

⁸Even with large moves between cohorts, if we see a fall in the proportion of individuals in a certain age group who are employed, the implication is that this group has borne some of the brunt of labour force reductions as a result of recession. If we see large absolute changes in employment, but the proportion employed has hardly changed, the suggestion is that this age group have retained a similar ‘rate’ of employment and therefore have not experienced so much of the pain of recession.

discouraged members of this group from activity—though again, the numbers and proportionate changes are relatively small.

Table 5.2 carries out the same analysis, but this time for the period of onset of the current recession between 2007 and 2009. Clearly, we are at a different point in the demographic history of the UK, as we see pronounced increases in absolute numbers across older cohorts and also in the youngest cohort. In contrast to the 404,000 drop in numbers of those aged 16–25 seen in Table 5.1, Table 5.2 suggests an increase of 180,000. This makes comparison with the recession of the 1990s difficult, but there would seem to be a number of conclusions.

First, if we focus only on the percentage changes in employment rates, the youngest age group once again bears much of the burden of reductions in employment, with a 7.2 per cent fall in the proportion of this age group who we observe in employment. The absolute reduction of 224,000 individuals is much lower than the 662,000 reduction we see in the early 1990s, but a lot of this can be explained by the very different changes in absolute cohort size between these two recessions.

Second, the slightly older cohort seems to share more of the pain of labour force reductions than previously. Though we must once again be a little careful with our comparison, as the 26–39 age group grows by 301,000 between 1989 and 1991 and falls by 93,000 between 2007 and 2009, employment falls by 2.5 per cent between 2007 and 2009 compared to only a 1.2 fall between 1989 and 1991.

Third, and perhaps the most striking finding from comparison of Tables 5.1 and 5.2, is the fact that between 2007 and 2009, the proportionate increase in unemployment rates is much more concentrated among our older age groups, while the proportionate increase among 16–25 year olds is almost identical

Table 5.2 Change in numbers and proportions 2007–2009 by age

	Aged 16–25	Aged 26–39	Aged 40–49	Aged 50–64	Aged 65+
Employed	−223,683	−304,389	76,400	155,082	99,644
	−7.2	−2.5	−1.2	0.0	12.4
Unemployed	224,182	270,755	149,036	119,141	3770
	32.7	65.8	58.4	52.6	23.3
Inactive	179,646	−59,457	−29,375	−39,923	218,683
	4.8	−2.5	−4.6	−3.3	−0.9
Absolute change in overall cohort size	180,145	−93,091	196,061	234,300	322,097
Per cent change in overall cohort size	2.4	−0.8	2.3	2.2	3.5

Source: *Quarterly Labour Force Survey(s)*, April–June 2007 and 2009

to that of 1989–1991. Among those aged 26–39, 40–49 and 50–64, we see unemployment rates rise more than 50 per cent between 2007 and 2009, while for the 16–25-year-olds, the increase is around 30 per cent in both recessions.

Our analysis hints at a fundamental change in the labour market between these two recessions, which is reflected in the relatively small changes we observe in inactivity for all groups aged over 26, in both recessions, but which is more substantial for 16–25-year-olds in both periods. Between 1989 and 2007, the proportion of individuals aged 16–24 who we see in education increased from 1.57 million to 2.76 million,⁹ significantly boosting the numbers of inactive 16–25-year-olds. In addition, this cohort falls in absolute size by approximately 850,000 between these dates (LFS 1989 and QLFS 2007).

By the time we get to 2007, there are many fewer of the youngest individuals in employment. Also, it is worth noting that (as we would expect from our previous discussion of activity rates) the employment position (or starting point) for older workers has improved substantially between the last and present recessions. Between 1989 and 1991, the employment rate for 50–65-year-olds was around 55 per cent and this rises to around 63 per cent by 2007–2009 (*ibid.*).

Finally, when considering those aged over 65, we can see some indication of our previous debate over whether the cup is half-empty or half-full. Between 1989 and 1991, there is a small (84,000) increase in the absolute size of the over-65 age cohort and most of this seems to be reflected in a 108,000 increase in the numbers of inactive individuals. In contrast, an increase of 322,000 in the size of this cohort between 2007 and 2009 is accompanied by an increase in employment of approximately 100,000, but also an increase of 219,000 in the number of inactive individuals.

Before moving on to conclude this section, Tables 5.3 and 5.4 consider changes in employment, unemployment and inactivity in later periods of the early 1990s and late Noughties recessions. Table 5.3, which considers the changes from 1991 to 1993,¹⁰ shows a continued increase in the number and proportion of inactive individuals aged 16–25 as the recession continued; it again suggests small changes in the proportions employed among older age groups, compared to the –10.4 per cent fall we see among the youngest age group, but in these later stages of the recession, we see an increase in

⁹ Office for National Statistics (2014), *Young People in the Labour Market*.

¹⁰ In this, we are comparing an Annual LFS (1991) with a Quarterly LFS (1993). To ensure this does not confound comparison, we have also compared the 1992 QLFS with the 1993 QLFS and this does not alter our conclusions.

Table 5.3 Change in numbers and proportions 1991–1993 by age

	Aged 16–25	Aged 26–39	Aged 40–49	Aged 50–64	Aged 65+
Employed	−899,445 −10.4	99,600 −1.7	35,701 −1.8	−126,908 −3.0	−18,300 −5.1
Unemployed	114,328 22.2	177,584 20.2	110,678 29.5	104,295 27.4	−4028 −17.9
Inactive	237,690 21.5	55,361 0.0	31,741 0.7	64,989 1.5	101,319 0.3
Absolute change in overall cohort size	−547,427	332,545	178,120	42,376	78,991
Per cent change in overall cohort size	−6.8	2.9	2.4	0.5	0.9

Source: *Annual Labour Force Survey* 1991 and April–June *Quarterly Labour Force Survey* 1993

Table 5.4 Change in numbers and proportions 2009–2011 by age

	Aged 16–25	Aged 26–39	Aged 40–49	Aged 50–64	Aged 65+
Employed	−88,302 −3.94	29,777 0.38	69,451 0.05	142,705 −0.47	158,384 17.48
Unemployed	66,602 5.3	−9060 −1.3	7590 0.9	15,569 1.9	−4034 −23.8
Inactive	172,327 4.5	−28,333 −1.6	2802 −0.6	113,014 0.8	229,483 −1.4
Absolute change in overall cohort size	150,627	−7616	79,843	271,288	383,833
Per cent change in overall cohort size	1.9	−0.1	0.9	2.5	4.1

Source: *Quarterly Labour Force Survey(s)*, April–June 2009 and 2011

unemployment (of between 20 and 30 per cent) spread more evenly across our age groups below the age of 65.

Table 5.4 shows how different the later stages of the present recession have been, with regard to employment and unemployment. In the present recession, UK unemployment has been much more subdued—not rising much above 8 per cent, and falling below 7 per cent in 2014. In contrast, the recession of the early 1990s had pushed unemployment above 10 per cent by 1993/1994. As a result, between 2009 and 2011, we see relatively small changes in the proportionate rates of employment, unemployment and inactivity, other than the continued fall in employment, increase in unemployment and rise in inactivity among the very youngest age group.

Many commentators will note the limitations of the present analysis—not least the fact that we are dealing with the *stock* of employees, unemployed and

inactive, rather than considering the flows in and out of these various labour market states. This limits what we are able to say about the situation of older and younger workers, as while younger workers tend to be quicker to flow into unemployment when the economy goes into recession, their probability of re-employment (once the economy recovers) is much higher than that for older workers.

We are not suggesting from the analysis here that older workers do not face forms of disadvantage and discrimination in the labour market; there is extensive evidence that workers feel disadvantaged by their age (see, for instance, *Tackling age discrimination in the workplace*, CIPD 2005). However, it continues to be the case that much of the pain of labour force reductions is felt by the youngest age groups, especially in the early stages of recession, and the employment situation of older workers has undergone a marked improvement over the last 20 years.

Where Do We Go from Here?

Our discussions to this point would suggest some optimism for the future, even in the face of significant increases in the proportion of older individuals in the population. However, any assumption that growing activity rates among older individuals can simply be extrapolated to the future is oversimplistic, and as we have seen, even at the present rate of growth, increasing activity rates would still imply a significant increase in the proportion of inactive individuals in the economy.

What Are the Prospects for Increasing Economic Activity Rates Among Older Individuals?

It is useful to first consider the UK position relative to other countries within the OECD, who are at a similar stage of economic development.¹¹ In 2012, the employment rate of older workers (measured as a percentage of the population aged 55–64) was 58.1 per cent in the UK and this compared very favourably to a number of countries in Europe such as Spain (43.9 per cent), Portugal (46.55 per cent), Italy (40.4 per cent), Greece (36.4 per cent) and France (44.5 per cent). However, there would seem to be room for improvement, as many of the Scandinavian countries have activity rates for this age

¹¹ OECD (2013), *Employment and labour markets: Key Tables*.

group that are over 70 per cent (for instance, Sweden with 73.1 per cent and Norway with 70.9 per cent), and countries that we may consider as being more similar to ourselves have also achieved higher rates—though employment rates in Germany (at 61.5 per cent) and the USA (at 60.7 per cent) are only slightly higher.

There is room for improvement, but as we suggest in the ‘Introduction’, it is the group aged 65 and over that will grow over the next 20 years. What are the prospects for significant expansion of employment rates among this group? To answer this question, we need to consider the policy levers that have already started to ‘push’ and ‘pull’ individuals into employment beyond traditional retirement age.

Considering push-factors, a raising of the state pension age (SPA) will likely cause a number of people to work slightly longer into old age, as it reduces the financial support available for earlier retirement. The SPA is currently 65 for men; it is gradually increasing from 60 to 65 for women (it is 62.5 as of April 2015), and from December 2018, it will begin to rise for both men and women, reaching the age of 66 by October 2020, and the expectation is that it will reach 67 by 2026.

In addition to this, we have seen how a decoupling of the Basic State Pension (BSP) from earnings in 1980 reduced the attractiveness of retirement at the SPA. However, the 2007 Pensions Act reversed this policy, and now, the BSP rises in line with earnings.¹² Such a policy reversal may be expected to ‘pull’ a few more people into retirement at a slightly earlier age, but here we come to an important point in our discussions—raising employment rates among older individuals may be good for the economy, but it may not always represent a desirable outcome for the individual.

For instance, one of the other factors that may push individuals into employment beyond their desired retirement age is the low level of interest rates in recent years and an accompanying fall in the return on the investments they rely on for retirement income. This is, in itself, a direct result of the death of defined benefit pension schemes, which provided individuals with a lot more certainty over their levels of retirement income. As with many policy debates, improved efficiency (which benefits the population as a whole) is often at the expense of a particular group, and this is where we start to see some potential for generational tension. This potential for generational tension is especially

¹² More specifically, it is now increased every year by whichever is higher:

- growth in average earnings;
- growth in the Consumer Price Index;
- 2.5 per cent.

apparent when we consider a policy that is likely to both increase economic activity beyond retirement *and* better ensure that those who do work beyond retirement do so under better ‘terms’—that is, the removal of UK employers’ ability to enforce a Default Retirement Age (DRA).

Removal of Default Retirement Age (DRA) and Generational Conflict

It has always been recognised that ‘tackling issues of age discrimination present[ed] a range of complex issues that [were] new to policy makers’.¹³ As a result, legislation outlawing age discrimination in employment and vocational training came into force later than other strands, in October 2006, allowing for a longer period of consultation. One of the issues that was particularly challenging for policymakers was the use of default, or mandatory, retirement ages by employers, which would become unlawful under the new legislation without a specific exemption (Urwin 2004). In the event, the 2006 Employment Equality (Age) Regulations allowed employers to set a Default Retirement Age (DRA) of 65 or over, and in these cases, the DRA age acted as an upper limit beyond which the regulations did not apply.¹⁴

From April 2011, new regulations came into force removing the ability of employers to specify a DRA for employees. Up to April, employers were able to give employees notice of mandatory retirement if the employee reached 65 before the end of September 2011. After this transition period, all employees have been free to choose the date on which they retire and employers who attempt to force them to retire at a certain age have been open to claims of discrimination or unfair dismissal.

This is a change that will have potentially far-reaching consequences, for lifetime career decisions, pensions and training, among others (see, for instance, Metcalf and Meadows 2010). On the other hand, it is not without precedent (Carr 2010). The USA abolished mandatory retirement in 1986 and Canada has done so more recently (though some Provinces/States did so much sooner in both countries). Across the range of evidence produced as part of the 2010 review (Wood et al. 2010; Morrell and Tennant 2010; Thomas and Pascall-Calitz 2010; Sykes et al. 2010), it was also suggested that

¹³ Department of Trade and Industry (2002), *Equality and Diversity: the Way Ahead*.

¹⁴ Employers had to implement a prescribed system through which employees could request to work on beyond any DRA, but the main challenge came from Heyday (a section of Age Concern UK). The legal battle was lengthy and it was not until September 2009 that the High Court ruled that, while the 2006 decision was not unlawful, the case for a DRA should be reviewed and the subsequent review (2010) resulted in proposals for the removal of DRAs.

a proportion of UK employees were already able to work beyond DRA, or did not face such a cut-off point (Meadows 2003).

However, experiences in the UK are likely to be very different from those in North America (where employment protection legislation favours the employer) and any prior arrangements for working beyond retirement in the UK likely varied significantly between different types of work.

In this respect, there have always been *two nations in early retirement*.¹⁵ We can characterise one group as being highly skilled, professional, office-based workers, considering retirement from a position of relative advantage. They are more likely to have relatively generous pension pots, accrued from higher earnings over their lifetime, and are also likely to consider working into old age (in a non-manual job) more favourably. In contrast, low-skilled workers, working on production lines, engaged in manual or repetitive tasks, who are less likely to have generous pension arrangements, are likely to consider working beyond retirement less favourably.

Both of these groups will benefit greatly from the removal of employers' ability to specify a DRA. For the more advantaged group, there are clear benefits as they experience an increase in flexibility over when to retire, based on pension considerations, health, caring duties, and so on. However, it is perhaps the latter group that stand to make the largest gain, as those who are forced to continue in employment because of a lack of financial stability in old age will now be able to continue in their current job. For those with higher levels of skill, there have always been more opportunities to move into relatively well-paid employment beyond retirement, if needs must. However, for a low-skilled group who need to work, but were previously forced to retire from their current job at the DRA, the prospects for re-employment have always been limited—they may not love their present job, but the removal of DRA is likely to improve the incomes they can earn if they are forced to work beyond their ideal retirement age.

There are a range of related factors that may re-enforce our assertion that the removal of DRA will make a significant difference to activity rates. A greater number of individuals may continue working because they do not relish losing touch with the social and personal networks within their current workplace.¹⁶ Employers may be more willing to train older workers if they have some indication that the skills learnt will be used for a greater number of years (Urwin 2006)—increasing productivity and therefore potential remuneration into later life. The economy continues to move away from manual

¹⁵ Atkinson, A. B. and Sutherland, H. (1992), *Two nations in early retirement? The case of Britain*, Welfare State Programme Discussion Papers, WSP 056. Centre for Analysis of Social Exclusion, LSE.

¹⁶ Barnes, H. and Parry, J. (2003), "Renegotiating Identity and Relationships: Men and women's adjustments to retirement", PSI Research Discussion Paper 14.

work and heavy industry, towards service-sector employment, and this may similarly accentuate the trend of increase in employment in later life.

However, the removal of DRA is an area where we also have potential for a raising of generational tensions. In economics, there is a concept called the *Lump of labour fallacy*. It is often applied to, for instance, immigration, and used to refute the argument that as we increase the number of immigrant workers, there will be, necessarily, fewer jobs for native workers. The basic premise is that while immigrants work, they also consume and pay taxes, and as a result, demand for goods and services increases and the number of jobs expands accordingly—there is no static ‘lump’ of labour to be shared around, with one group getting more, necessarily meaning that another group gets less.

At first glance, we may see the removal of DRA as an example of this situation—just because older workers extend their working lives, it does not mean that younger workers lose out on job opportunities. However, implicit in our consideration of the lump of labour fallacy is the assumption that employers have free rein to hire and fire, and they do so in line with the overall productive needs of the firm—as a result, the economic cake gets bigger and everybody can have a larger slice. However, the removal of the DRA is a very different situation as it changes the nature of power relations within the employment relationship. Previously, employees who reached DRA had no power in the employment relationship—they were not covered by employment protection legislation. Now we have an increase in the power of older workers, who can dictate their point of exit from the labour market (independent of an employer’s productivity considerations) and this will not necessarily increase the size of the cake for all. In fact, it has the potential to lessen employment opportunities for younger individuals and make the fiscal position worse, as it may place a cost burden on employers. For the lump of labour fallacy to apply, employers need to be making the hiring and firing decisions.

Consideration of the DRA is part of a wider question of generational fairness. There is some concern that policies aimed at alleviating the fiscal pressures of an ageing workforce (Dilnot et al. 1994; Dilnot 2012) might have an impact on generational fairness. We have already seen how initiatives to extend working life such as the removal of mandatory default retirement ages (DRAs) may tip the generational balance, but there are also concerns over the rising costs to the National Health Service (NHS) of ageing populations, the unequal distribution of housing wealth, which is concentrated among older age groups and the removal of company-defined benefit plans (Pryce et al. 2015). The suggestion is that future generations will receive fewer resources in their old age (Willetts 2010), while they spend their youth making substantial transfers to the generation who are currently old.

Conclusions

Figures 5.1 and 5.2 suggest the UK faces a rise in the proportion of individuals among the population who are aged beyond usual retirement age, but that some of this increase may be accompanied by a rise in activity rates. Unfortunately, this is unlikely to be enough and we need a more pronounced rise in activity if we are to counter the implied rise in ‘dependency’. Our analysis and that of researchers publishing in areas such as medicine (for instance, Spijker and MacInnes 2013) suggest we need to change our approach to ‘dependency’, as the medical advances that we worry will drive up costs in the NHS render obsolete a measure that considers everybody over the age of 65 as ‘dependent’. For instance, in mid-2012, the dependency ratio for the UK was 3.21—that is, there were 3.21 people of working age for every person of state pension age (Pryce et al. 2015). As we can see from our study of activity rates, it would be more useful to measure the ratio of active to inactive working-age individuals in the population, no matter what their age.

In the normal run of things, we are likely to observe a continued rise in activity rates and the large historical falls seen in the activity rates of older workers (in the 1970s and 1980s) were confined to a generation who suffered during a period of economic upheaval and restructuring. In the absence of such a structural upheaval, we have some evidence that, even during more cyclical recessions (if the most recent recession can be counted as such), we are likely to observe continued rises in older worker activity rates. Successive generations of older individuals seem more likely to work into older age, and the policies introduced by successive UK governments have likely helped to ensure that this continues.

However, working on in later life is not a desirable option for all workers, and while the removal of DRA has improved the options available to older workers, it is possible that this may impact negatively on employment opportunities for some younger workers. The lump of labour ‘fallacy’ may not be such when applied to the DRA. However, it is a fallacy when applied to immigration and we must remember that while this option has become unpopular in the present political environment, it is an easy way to rebalance the dependency ratio, as it draws in younger workers.

It would seem that the removal of the DRA and a host of other policies have the potential to cause friction between generations. However, in all of this, we must take on board the findings from the literature on intergenerational social mobility, which reminds us that the children of poor parents are increasingly likely to remain so (see, for instance, Blanden et al. 2005). Any generational ‘clash’ is likely to be felt more by those on lower incomes,

if the specifics of who ‘wins’ and ‘loses’ within one generation increasingly determine the prospects of their offspring in the next generation. We need to remember that we are all somebody’s son, daughter, grandson or granddaughter. Not everybody is in a typical nuclear family, but there are strong ties between generations that are as important, if not more, than many other social bonds. This reduces the perceived levels of generational conflict and returns us back to concerns over the intergenerational transfer of advantage and disadvantage between generations.

Similarly, we must be careful to note the potential benefits from the removal of the DRA, as age diversity increases in the workplace and there are greater opportunities for a passing on of skills and experience between generations. These benefits may increasingly accrue even in situations where employers have less say over exactly who continues in employment. As we see more older and younger workers in the workplace, it is also less likely that we will see generations conflicting—if there is anything we learn from the diversity literature (Urwin et al. 2013; Pryce et al. 2015), it is that people who live and work together, develop greater empathy.

On a final note, it is useful to pursue our argument on dependency ratios to its logical conclusion. If we move away from considerations of age, towards a comparison of activity and inactivity (irrelevant of age), we would need to consider the growth in inactivity over the last 20 years among those aged 16–25 (mostly as a result of increased enrolments in education). There is extensive evidence that entry points into the labour market for the very young have been significantly reduced in recent decades¹⁷ and we certainly do not wish to discourage this trend of increased investment in human capital. However, it does not change the fact that, over this period, those aged between roughly 25 and 64 have had to bear the burden of increasing inactivity at the top and bottom ends of the age distribution. Considering the age distribution of the UK population, this group constitutes something of a ‘squeezed middle’, and the next few decades are likely to see a tightening of this squeeze.

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¹⁷ See for instance, the Wolf Report (2011).

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6

From Age Diversity to Embedded Ageing: Exploring and Addressing Aged Assumptions in Organisational Practices

Sophie Hales and Kathleen Riach

The growing recognition that ageing is central to any management and policy agenda across the world has signalled moves both at a legislative level via discrimination law and through organisational initiatives to welcome workers of all ages. However, there are still questions over the efficacy of these developments in ensuring that individuals are afforded meaningful, secure employment that draws on their individual, specific and accumulated skills and competencies throughout their working lives. One reason for this has been the ongoing challenge of transforming attitudes surrounding how organisational stakeholders behave, think and relate to those viewed as being at a particular stage in their lives. A growing evidence base of studies that suggest unfavourable perceptions surrounding older workers still exists, and perceptions are often intimately intertwined to other social categories including gender (Moore 2009; Irni 2009) and socio-economic status or class (Zanoni 2011; Riach and Cutcher 2014). Similarly, at a structural level, there is a growing concern that as individuals grow older, they face increasing challenges in advancing in or re-entering the labour market (Hirsch et al. 2000; Chan and Huff Stevens 2001). At the same time, 'younger' workers may be

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viewed negatively and those at the beginning of their careers may also face difficulty in finding work that is developmental, meaningful and holds promising career opportunities for advancement (McDowell 2011). However, a key intermediary between these two levels of inequality is ‘Organisation’. This not only considers age-specific policies or practices but also considers ageing at work as simultaneously experienced and understood through a range of norms and assumptions about what constitutes ‘work’. In this sense, a contextual understanding of workplace ageing is needed which considers how insidious beliefs surrounding age, stage and ability may manifest within the bureaucratic and often mundane practices and policies that form part of the day-to-day structuring and cultural context of organisational life.

In this chapter, we show how these life course positions and cultural dimensions of organisation must be considered as simultaneously experienced in and co-constructed alongside the broader sociomaterialities of work. To do so, we situate our discussion in a broadly sociological account of ageing that has been particularly influential within Organisation Studies as a sub-discipline of business and management research. Although this is an approach that embraces a plurality of different perspectives, its theoretical sympathies lie in understanding ageing as a contextually embedded phenomenon configured by various cultural, social, political and historical circuits that are used to shape people’s meaning of age and ageing. This moves a conceptualisation of ageing away from being something that is objectively measured and encountered, to a phenomenon that is experienced, negotiated and accomplished. Therefore, resituating ageing as an active force that both shapes and is shaped by organisational practices must be accepted if initiatives surrounding age diversity and positive age management are to have significant impact. In particular, we need to move away from age as being either primarily chronologically determined or implicitly ‘attached’ to an individual or group of employees. Instead, there is a need to consider how larger narratives surrounding ageing not only influence individual perceptions but also constitute part of a broader landscape where organisational bodies, practices and sites intermingle to constitute what ageing at work means.

To do this, we begin to move from ‘age’ to ‘ageing’ by exploring the two common lenses that influence the way we think about, and subsequently shape, organisation age management practices. We then develop recent commentaries surrounding new materialisms as a means of introducing the concept of ‘embedded ageing’. We argue that considering the interstices through which we come to understand both ageing at work and work practices themselves may be one way of articulating the penetration of taken-for-granted aged paradigms in organisational practices. By means of exemplifying the explanatory purchase of

embedded ageing, we close with organisational examples relevant to the organisation of ageing, suggesting how an embedded ageing approach may serve to re-orientate the way we consider ageing in an organisational context.

From Age and Employment to the Organisation of Ageing

Age and employment studies (AES) is an interdisciplinary field drawing from research traditions including social gerontology, psychology, sociology and social policy. Scholars are drawn together by a broad concern with how age is perceived, experienced and managed within workplaces and the labour market more generally. Until recently, this has focussed empirically on exploring ‘older worker experience’, leaving other disciplinary silos, such as youth studies, to focus on other specific age cohorts. In many ways, this is to the detriment of the discipline, both theoretically, in terms of the ways we think about age as primarily focussed on individuals or groups (rather than organisations), and practically, where we become concerned with practices that assume chronological identification is our primary classifier. This has meant that for the large part, AES locates ‘age’ as derived from the individual, rather than from the messages or cultural puzzle pieces we draw on in organisations to make sense of what age is at a broader epistemological level.

To move age on from something attached to an individual to a phenomenon intimately related to larger dynamics within and surrounding working life, it is important to shift attention away from age as a classifier, category or identifier. Instead, we need to turn to how ageing *as a process* is not simply something that ‘happens’ to an individual within a particular setting, but rather is actively negotiated through, experienced in and constituted alongside sociocultural settings. This helps to re-orientate our focus on what may influence age relations through breaking away from assumptions or truth claims about what is ‘old’, for example. While the focus of recent research has been on age of the individual rather than broader ageing dynamics, the potential for AES to draw from its interdisciplinary heritage to uncover these dimensions is already realised in some ways, although rarely talked about in such explicit theoretical terms. For example, the field has benefited from debates surrounding the structural or political economies that result in age-related inequality throughout the labour market (e.g. Walker 1981; Grady 2013). Within this work, a move away from individual age towards interrogating how structures inform and organise ageing helps to emphasise, for example, ‘the role of social policies in opening up or closing down opportunities for older people’ (Walker 2005: 816).

However, exploring ageing as an organisationally constituted phenomenon is by no means a one size fits all approach. Following interdisciplinary traditions in AES, there are a variety of ways we can understand ageing that each take different views on the role and importance of the body, culture and structure. To begin exploring these positions in more depth, it is useful to identify two contrasting perspectives surrounding ageing that have been formative in the field of AES.

Ageing as Biological

The first dominant assumption within AES is that ageing is closely correlated with a biologically determined life span. This is what we might term a ‘biomedical foundation’—that is, a predominant concern with the biological processes associated with both growing older or particular stages of life. Specifically, physical processes of biological decline are classified and require increasing medical intervention through biologised ascription. In many ways, this intimate association between age and the body is unsurprising, given that traditionally, chronological age has been used to define and classify clinical practices and structures that have played a formative role in early studies of age at work. In particular, theories derived from clinical gerontological research were often used in early studies of older workers, even though those being researched were considerably younger than those who were traditionally the focus of gerontology. This influence was also seen in studies choosing to draw on frameworks of understanding derived from developmental psychology where assumptions were made surrounding chronological age and cognitive or physical changes (e.g. Rhodes 1983).

This perspective means, a medicalised body is at the centre of ageing debates, situated as an entity that can be ‘entered, studied and tampered with in order to be repaired’ (Koch and Webb 1996: 957). Of course, this concern with engaging in medicalised body practices that will positively influence ageing has been enduring since the enlightenment when ageing moved from a religious to scientific ‘problem’. For example, former US president Benjamin Franklin charged science as having a cure for all ailments, including old age, while others engaged in a variety of experiments, such as the nineteenth-century endocrinologist Brown-Sequard who self-injected a concoction of animal blood, juice and semen as a strategy of rejuvenation (Cole 1992; Haber 2004). However, what is of note is that the dominance of a biomedical understanding of age has had a significant influence on the way that ageing is used to pathologise, demarcate and inevitably marginalise people—a trend that can also be seen in research exploring ageing and work.

For example, studies continue to begin from psychological and medical evidence of functional decline as a basis of differentiation between different age cohorts (e.g. Ilmarinen 2001; Popkin et al. 2008). However, at a conceptual level, this strengthens the idea that age is an indicator which is: (i) primarily used as an individual identifier, and (ii) a stable effect that can be measured or managed in some way. Together, this results in an implication that 'age' is a classifier that holds some degree of homogeneity across individuals and can subsequently be both used as a control variable in studies and quantified within managerial interventions.

As age expectancy increases, and the chronological difference between an 'older worker' and an 'older person' becomes even more significant, the immediate transplanting of ideas surrounding ageing medically and ageing at work has altered, although the continued influence of medicalised accounts of ageing can be seen as policy, and practice mirrors the changing approaches to ageing in the natural sciences. Specifically, the move from a deficiency and decline assumption as assumed in early clinical studies of ageing has been superseded by a return to questioning the inevitability of unidirectional decline and the role of both environment and individual action of slowing down or even reversing the ageing process. As Martin and Gillen (2013) suggest, this may be closer to the original intentions of one of gerontology's founding fathers, Metchnikoff, who first identified the need to consider older age beyond a solely biological definition back in 1903. However, the translation of broader social and contextual considerations has most recently been dominated by the term 'successful ageing' (Rowe and Kahn 1997). Emerging from functionalist theories surrounding ideas of continued engagement and roles ascribed to particular life stages, such as activity theory (Lemon et al. 1972), successful ageing has sought to challenge the idea of 'natural' decline and instead focus on how individuals have the possibility (and some would say, the responsibility) to behave and act in particular ways that will maintain health and well-being as they grow older (Katz and Calasanti 2015).

In this sense, successful ageing, or its corollary, 'productive' or 'active' ageing (terms popularised in policy accounts of 'growing older productively' in the sense of active employment and little reliance on social welfare) can be seen as a renaissance of biomedical dominance in studies of ageing. This allows managers to articulate ageing as primarily something that happens *to* the body and can be mitigated against or controlled by the individual, as opposed to being part of a tapestry made up of bodily experiences and social contexts across the life course. For example, we see recommendations and strategies that can help the older worker to 'offset' possible performance-related declines as one ages (Abraham and Hansson 1995; Baltes and Baltes 1990; Robson et al. 2006). In many instances, such approaches focus on individual dispositions

or competencies, inadvertently negating the importance of other factors that may cause inequality. At the same time, the biomedical view of age has significant implications for the creation of labour markets created to cater for the maintenance and bodywork of those who have ‘succumbed’ to ageing, notably the aged care sector.

These foundational understandings of ageing as biological may not be explicit in age management policies, but are nonetheless foundational in how we think about age diversity. First, age diversity is based on the premise of being able to identify ‘the diverse’, often through looks or physical appearance. In doing so, this identification leads to the assumption that those who share some ‘diverse’ characteristics may be subject to the same experiences of opportunities in an organisation. Second, age management often uses markers (such as ‘ages 50–65’) to group together individuals, once again reinforcing the notion that some ‘truth’ may be garnered through chronology. While there may be some overlapping of experience due to shared experiences across a cohort, there is a danger in taking a proxy, such as chronology, as fully explaining the complexity of individual experience within an organisational setting. Finally, the dominance of successful ageing in the rise of later life health initiatives that form diversity campaigns may be subject to the same criticisms as can organisational well-being agendas. This includes negating institutional responsibility for occupationally derived health issues such as work intensification and stress, all of which may accumulate over the life course (Dale and Burrell 2014). Such debates, while rooted in an assumption of the ageing process as driven by biology, introduce ideas surrounding individual responsibility, as well as economic rationale about who may be best to invest in commercially.

Ageing as Socioculturally Constructed

The second lens through which to understand ageing and organisation draws on poststructuralist accounts of reality, where there is a concern not with a ‘substance’ of age in any material sense, but rather how particular ideals or narrative serve to constitute and reproduce our understanding of age or age-related matters. In other words, to understand what ageing is, we cannot turn to the individual or the biologised body for answers or facts, but instead must look at how particular messages and norms surrounding what ageing means are constituted, reproduced and transformed in a variety of arenas such as work, home and the media. This position asks us not only to explore particular assumptions surrounding ageing at work, but identify and question what (socially constructed) ideals those assumptions are built upon.

For example, ageing ‘events’ often use a fixed idea of objective time as sanctified in the Gregorian calendar, as shown by Bytheway (1995) and Fineman (2011) who explore the cultural significance of birthdays. In focussing on ageing as socially constructed, we are encouraged not to think about a birthday as a fixed point in the objective passing of time, but rather an important symbolic event that is organised in ways that encourage particular meanings. As Fineman (2011: 25) suggests in his discussion of birthday cards: ‘They “bottle” age [...] oblique and not-so-oblique jokes sit alongside cards that tease, provoke, mock, shock, sexualize, debunk, or flatter’. In the same way, such time-orientated events may be recognised within an organisation or even created within organisational practices. Celebrations of years of service or eligibility for certain work-related benefits are based on a social consensus of the fixed measurement of time that are both sanctified in how society understands the passing of time and recognised by organisational stakeholders as a legitimate threshold for differentiating between employees.

The past 20 years has seen a growing interest in viewing ageing in organisations through this lens, particularly within discursive accounts of ageing (Ainsworth and Hardy 2008; Riach 2009; Spedale et al. 2014). Discursive accounts of ageing at work focus on the identification effect of particular ideological repertoires that circulate organisational arenas. For example, they may focus on ways that older workers are marginalised through the presence of aged subject positions that suggest individuals who look or act in an age-typed way are more or less appropriate for particular types of work. For example, Ainsworth and Hardy (2008) suggest that ‘older workers’ are both co-opted and precluded within discourses of enterprise while Pritchard and Whiting (2014) suggest that the presentation of generational comparisons in itself legitimises organisational differentiations through age. Elsewhere, Trethewey (2001) has shown how professional women have to negotiate a discourse of decline through strategies of managing looks and behaviour. The policies and practices organisations adopt at an institutional level may also reproduce aged biases. For example, Zanoni (2011) demonstrated how older workers were negatively positioned within a factory’s ‘lean’ processes. Alongside other commonly ascribed diversity categories, such as ‘disabled’ and ‘women’, older workers were positioned in a way that was intimately connected to justifications surrounding organisational policies such as outsourcing, to ensure profitability, suggesting that diversity dynamics ‘are related to specific institutional contexts in which they are embedded’ (Zanoni 2011: 121). Similarly, Riach and Kelly (2015: 294) show how practices surrounding regeneration, restructuring and technological change in organisations may coalesce with older worker exit strategies since ‘the image that is synonymous

with an older worker may embody what organisations are continually trying to avoid: the old, worn-out, out-of-date, unfit parts of an organisation that need to be replaced or hidden in some way'.

Elsewhere, other scholars have focussed how the social construction of ageing informs larger trends and assumptions that, in turn, influence organisations and labour market policy more generally. For example, Katz (2000) draws on a Foucauldian notion of governmentality to suggest that age is subject to a range of 'technologies'—techniques through which individuals come to recognise themselves or others as legitimate or socially recognisable. These invariably close down a plurality of how we can express our ageing experience since they limit ways in which, for example, 'older workers' or 'younger workers' are expected to behave. Foucault's ideas have proven similarly influential within AES where scholars such as Moulaert and Biggs (2013) have drawn on ideas surrounding power relations to show how the idealisation of active ageing described previously means that ageing 'successfully' is now both a choice any older person can make and a failure of the individual not to subscribe to such ideals.

A reorientation of ageing as a social construction has also provided useful ways of critiquing biomedical views of ageing discussed above. Understanding that many views of ageing may appear to focus on the body as a biological fact or entity but are actually culturally constructed in a particular way to produce truth claims about ageing allows researchers to reintroduce the importance of power and control in terms of who creates and controls biomedical messages surrounding ageing. In particular, both the successful ageing and anti-ageing movement have been subject to critique for advocating modification that requires the 'right' investment of professional lifestyle and consumer choices by the individual. In this sense, ageing—or the prevention of the effects of ageing—becomes an aspirational means through which discrimination and labour market disadvantage can be avoided if one is prepared to personally invest in its prevention. For example, keeping skills and competencies up to date or ensuring the working body can endure the onslaught of long hours or a highly stressful job becomes both necessary and an individual's responsibility in today's economy (see Riach and Kelly 2015). Similarly, who is identified as an 'older worker' may differ across occupational settings and professions, depending on the organisational cultures or norms (Fineman 2011).

Within this position then, we see the possibility of moving from exploring ageing as a process that operates in and around a 'neutral' container of an organisation towards a more processual understanding of the organisation of ageing. In other words, ageing itself, along with other unspoken ideals and assumptions, can be seen as a continually changing but central

principle in how we come to understand organisation life and the policies and practices which come to constitute work. This requires us to think of organisations not as vessels in which ageing happens, but rather as entities made and constituted by the constructed ideas and messages surrounding ageing that circulate society. If we agree that 'any organisation *is* the way it runs through the process of organizing' (Weick 1969: 91), ageing is seen as one component used to make sense of, and subsequently influence how organisations are organised.

This has significant consequences for how we view age diversity practices and how they operate within organisations. For example, focus turns to how assumptions underpinning age diversity as a concept are used in organisations that, in turn, inform practice. We may also question how policies allow people to differentiate between legitimate (such as pension age) and illegitimate (such as discrimination) differentiation based on an age category (Riach 2009). This can also help us to understand how the language and terminology we use to discuss ageing and growing older in a workplace impacts on not only how employees think about age but also how their identities have been created through norms and assumptions about how people grow older. Such a lens is therefore important for reminding practitioners and organisations that policies may be both a reaction to, and a reproduction of, negative ascriptions to particular groups of workers.

However, at the same time, a focus on the social construction of ageing sees the mutual constitution of ageing and organisation as occurring at the level of language and culture. Emphasis on how we *think* and *talk* about ageing may therefore inadvertently neglect how the ageing body itself is an integral part of working life beyond being a 'symbol' of looking old or young that can be read through particular cultural scripts. Ageing, while seen as subject to a number of constructed ideals, is still understood as something that happens *to us* as a result of cultural scripts, rather than being ascribed a more dynamic or 'lived' quality that considers how we sensually experience our working lives over time.

In summary, both approaches provide both opportunities and limitations in helping think through ageing at work and the policies which inform and are informed by biology and culture. While the first approach is valuable in recognising the changes that occur in the body over time, the latter emphasises the importance of social and cultural ideas that come to inform how we identify or think about age. In exploring a third approach to ageing that develops these two important aspects, we now consider how we might think about ageing itself as experienced and transformed through the constant intermingling of organisational landscapes and working bodies.

Towards an Embedded Ageing

To recap, emphasising ageing as both an issue for management consideration and a phenomenon that shapes and is understood through organisational life is one of the key challenges facing today's workplaces. We have begun to see a consideration of the former in the form of both diversity initiatives often targeting particular cohorts of workers, or the emergence of broader 'age management' strategies, as discussed elsewhere in this book. However, it may be that we also need to simultaneously consider the way age and ageing is integral to parts of the organisation that are often not the focus of equality or diversity practices, ensuring that the context and individual experience are not relegated. To try and articulate the possibilities for exploring this further within a relational approach that takes into account how we experience ageing as a dynamic embodied process in organisations, we now introduce what we term here an 'embedded ageing' approach to organisational ageing.

'Embedded ageing' is a way to explore the relationship between age-related assumptions, lived experience, organisational norms, expectations and practices. Ageing in organisation is thus understood as focussing on the sociomaterial relationalities between actors (people or other phenomena), knowledges (how we come to be orientated or make meaning of our worlds) and sites (the contexts in which we are embedded). This focus allows us to unearth and reflect on—and subsequently appreciate—how an individual's positionality within this realm may produce particular aged effects.

While such an approach is growing in popularity within disciplines including media (Parikka 2012) and cultural studies (Alaimo 2010), it is still to gain traction within studies of organisational life in general, and studies of ageing in particular. Embedded ageing as a concept is informed by a range of theoretical positions, including performativity, phenomenology and new materialism. These provide a broad set of positions to focus on ageing as experienced through the relationships and interactions between bodies, sites, objects and ideologies. Such an approach has begun to make inroads into studies of organisational life through highlighting both the positionality and durability of particular ideas or assumptions (such as those concerning older workers) as situated in particular places and times, and latterly, how this is intertwined with particular ethical imperatives surrounding change or responsibility (e.g. Scott and Orlikowski 2012). For example, in this sphere, we understand ageing as a material manifestation of embodied temporality, not *a priori* or separate to the social or cultural production of regimes surrounding 'youth' or 'old'. These systems of relations between people, things, processes and objects, often termed 'assemblages' or 'entanglements', highlight how ageing is at once

embedded in the context in which it is experienced, and punctuate the way we come to understand different aspects of the (working) world.

In following the logic of recent accounts of the sociomateriality of work (e.g. Orlitzkowksi and Scott 2008), we can recognise the extent to which particular embodied practices of ageing intersect with organisational life and larger sociocultural ideas surrounding growing up and older, caring structures and retirement. As Carlile, Langley and Tsoukas (2013: 2, original emphasis) suggest, ‘activities in organisations are not merely situated in the ideational realm but deeply implicate *sociomaterial practices* through which they are enacted... through the use of objects, the training and use of the body and engagement in certain practices’. Attempts to articulate growing older within this approach begin by understanding the experience of ageing at work as an inherently relational process. This process is invariably manifested in the simultaneous intertwining of cultural production and material experience. In other words, ageing is simultaneously ‘felt’ as part of a lived experience of work, and interpreted through the exchange, collusion and collision of sociocultural scripts.

While accounts of age and work rarely refer to a sociomaterial understanding of ageing, increasingly we see a consideration of bodily experience and cultural apparatus of ageing being simultaneously considered. For example, a number of AES drawing on a concept of generation as a means of providing a space for considering how our embodied positionality in a particular time and space may overlap or differentiate with others. While some work has found explanatory purchase in generation as shorthand for ‘cohort’ and a differential point of comparison between different age groups (e.g. Benson and Brown 2011), others engage with a sociologically informed concept of positionality of the self within particular landscapes or experiences that may shape outlook, beliefs or interpretations on the world of work.

Elsewhere, we can see the beginnings of a more radical recognition of positioning the ageing body as an active *prima facie* basis for experience and knowledge. This means that the aged body becomes both the way we come to understand and experience the world and the site through which various sociocultural ideas and narratives are inscribed. For example, Riach and Cutcher’s (2014: 782) study of ageing in the financial services shows how ‘temporal, spatial and cultural contexts that the traders lived in and through do not simply surround their bodies: they are etched onto them’. In this sense, ageing is always a situated bodily phenomenon but cannot be extracted from either organisational context or an individual’s location within the life course. Focussing on embedded ageing therefore holds distinct possibilities for how we come to understand ageing. On the one hand, it provides one way of providing a contextually rich account of ageing at work that must take into

account that we come to ‘know’ ageing through work, and in turn, explore how work is constituted through our understanding and experience of ageing. On the other hand, it also provides possibilities for recognising that ageing is a temporal embodied experience that we may overlap or differ from others due to our situated experience and our accumulated understanding of the world. To further develop these insights in terms of their implications for ageing and employment and age diversity more specifically, we now articulate the key principles that underline the concept of “embedded” ageing’.

First, embedded ageing does not negate the pervasiveness of cultural messages or ideas surrounding ages nor denies that we experience bodily changes as we move in and through time. The body is not seen as a reactive vessel in a biomedical sense, nor conceptualised as something that can be reduced to the sum of discourse or signification. Instead, our bodies are reciprocal agents with other living and non-living things that come to simultaneously engage with and rebound into the world. Ageing is not simply an individually located experience or sociocultural phenomenon, but experienced through our situated presence in particular organisational sites and trajectories. This allows us to consider employees as holding particular attributes and characteristics that are the result of both interactions and accumulative skills they have experienced over their own personalised trajectories, and capabilities inflected in the historical and cultural remnants of the organisational site in which they are currently situated. We can further understand this through Ingold’s (2000) concept of ‘dwelling’, as a way of highlighting how knowledges are created through both our orientation to the world and our interaction with other people, objects and environments. At the same time, we need to be mindful that within workplaces, individuals can often come to understand and subsequently make decisions about their own and others’ positionality and accumulation through particular organisational and social narratives or cultural scripts. Such scripts may inadvertently negate individual attributes or dispositions, encourage us to ‘forget’ or negate our personal bodily experiences. Embedded ageing provides a way of articulating the importance of age ‘mattering’ through taking account of the embodied experience of ageing within particular contexts without problematising or denigrating particular groups or individuals.

Second, within an embedded ageing approach, we forefront the relationality of all the different aspects that serve to constitute organisational life. It is in: (i) the enmeshment of ideas surrounding ageing bodies, (ii) the sites in which they are located in terms of particular spaces at particular points in time, and (iii) the organisational regimes that both react to and interact with a number of external environmental factors that we begin to understand how

age organises work patterns, practices and structures, similar to the way that studies have explored gendering in organisations (e.g. Acker 1990)—what we might somewhat clumsily call ‘agering’. In other words, we appreciate how age is both an organising principle and logic that structures the way we think about all aspects of work and society, not simply those we think of as explicitly or immediately related to age and ageing. Key to this is understanding the potential for not just individuals but other entities to enact or affect a world or work that is in a constant state of rematerialising. While this may feel like an almost overwhelming task to begin to consider, it does allow us to consider how different aspects of an organisation come together to tell a story about ageing, exploring the points of similarity and difference that emerge.

Finally, embedded ageing captures the dynamism of ageing and organisation as mutually constituted and created. In doing so, it helps to introduce previously unrelated elements of organisational life and ageing. For example, we may consider how recruitment practices and strategies and promotion opportunities are underlined by similar or different temporal landscapes in which we understand our experience of growing older. However, to view this as simply ‘carried through’ or reproduce discourse fails to show how, once those recruitment policies are committed to paper, they may in themselves enact ideas which they were not intentionally or originally related to surrounding who is desirable, ideal, or wanted within the organisation. This may, in turn, be used to produce different workforce populations or inform promotion or organisational cultural activities. In providing a lens in which we can begin to explore these ideas, embedded ageing allows a broader consideration of how practices or context that were developed with no explicit reference to ageing may be helping or hindering the potential of a workforce through inadvertent or hidden aged biases.

Exploring Embedded Ageing in Organisational Practice

The embedded ageing approach as introduced above may require us to reimagine ageing as we currently conceive of it within an organisational setting, which invariably presents us with challenges in terms of how it translates into practice. To reduce embedded ageing to an identification of negative perceptions may negate the importance of the situated body in how we all come to understand and explore ageing at work. On the other hand, to only consider the body may result in a reduction to an individualised focus on managing the biomedical problem of ageing. Therefore, in this final section, we present

some possibilities for how an embedded ageing approach may begin to help us think through age diversity in a workplace setting in a way that takes into account the mutual constitution of ageing and organisation.

Embedded ageing may be a valuable heuristic in calling into account practices that may appear on the surface to be age-neutral, and subjecting them to a mode of 'age auditing'. Age auditing is a means of resituating ageing vis-à-vis practices and contexts that, on first sight, may preclude any explicit mention or even immediate association with ageing but are nonetheless part of the world that invariably influences how we come to 'ager' organisations. In practice, this may involve an actual auditing process, such as multiple-stakeholder question sessions, or via the use of an age-embedded audit tool to help identify and rate ageing inequities that emerge in various organisational practices and policies. This may then be subsequently used as a basis for strategies to challenge aged affects. Below is an abbreviated example of an auditing tool that may be used within specific departments as a means of identifying age-embedded aspects of work practices and procedures. This particular tool is based on a 5-point scale of unmet (0 points), partly met (2 points) and met (4 points), with a higher overall score suggesting more 'ageing aware' practice (maximum of 40 points) Table 6.1.

In contrast to diversity which often focuses on specific practices, age auditing invites a consideration of ageing where it may not initially be considered relevant. However, as Lorbiecki and Jack (2000) argue in their broader discussion of diversity, such an approach must focus on ageing as an issue that affects all, rather than forming a consensus around what 'younger' or 'older' employees need, as such an oversimplification of similarities and differences may inadvertently encourage essentialist accounts of difference. Slipping into damaging dualisms thus requires a language that takes into account trajectories, rather than concepts of time served, for example.

Embedded ageing may also provide new ways of understanding how commonly attributed stereotypes forge a connection between 'older workers' and workplace activity, and how they may be challenged. For example, change management or, more specifically, how organisations plan, design and execute change within their organisations has been one sphere where aged biases come to the surface. Research suggests that employers view older workers not only as less adaptable to change but also as actively resistant of change (Loretto and White 2006; Parry and Tyson 2009). However, change fatigue may also be more likely to be experienced by those who have been in an organisation longer and have therefore been through a larger number of changes. Similarly, another area rife with stereotypes is technology, where older workers have been commonly associated with hesitation or difficulty with IT systems. For

Table 6.1 'Embedded Age' audit tool

Department/unit:	
Name of auditor:	
Date:	
Areas of practice	Rating
Designing practices and procedures (P&P)	
1 Is there clarity surrounding what previous experience end users may require during design P&P?	
2 Are systems or practices developed by a multigenerational team with different disciplinary backgrounds?	
3 Is there a consideration of different end users' prior knowledge during P&P design?	
4 Is there flexibility in the P&P design to take into account differing levels of familiarity with key elements?	
Implementing P&P	
5 Does implementation recognise the benefits of previous systems?	
6 Is take-up assessed and possible reasons behind this trend discussed?	
7 Do estimated time allocations take into account diverse approaches to learning and knowledge accumulation?	
Communication	
8 Are communication tools free from jargon, social media language and acronyms?	
9 Are image stocks used in communication representative of a wide demographic?	
10 Do feedback mechanisms provide an opportunity to assess perceptions of efficacy based on demographics?	

example, Van Dalen et al. (2009) highlighted how older workers were often perceived as having lower motivations surrounding IT training while Malul (2009) follows a modernisation thesis in suggesting that compared to those aged 18–40, older workers—those aged over 50—are significantly negatively affected by technological change. This may, of course, be connected to perceptions surrounding resistance to change, since IT is one of the main areas where constant updating or upgrading is a common occurrence within the workplace. However, IT is also an example of a practice that not only has integrated into professional (and social) practice but also has correspondingly transformed how people think and behave.

How might embedded ageing help us think through these two areas? To take change first, embedded ageing reminds us that change itself is a relational management practice: it relies on a situated relationship between a (flawed) past to a (better) future. Similarly, we assume that as individuals age, there is some continuity which can somehow be used as a proxy for judgement surrounding competency or skill. Change in this context brings forth particular temporal assemblages that we can see informing aged ideologies or assumptions. These ideas are ensconced within the dynamics and disruption

of organisational change itself that may have consequences for individuals as they move through the life course. Embedded ageing thus calls for a reconsideration of not just the people involved in change, but how organisational change itself may be disrupted in a way that sets up new modes of practice that create intensified structures and systems of working. For example, the temporal proximity of information, often fed asynchronously (such as two people writing an email reply at the same time) and the need to assimilate information immediately regardless of the location where the information is ingested (such as on mobile devices at any time of the day) does not simply alter our work practices, but transforms our embodied experience of work in a way that was impossible to imagine 30 years ago. Such changes are part of the new organisational ways of knowing and identifying with our workplaces that create 'systems that enable people to filter, control, and manage their relationships with the spaces and people around them' (De Souza e Silva and Frith 2012: 5). At the same time, the consequences for not filtering, controlling and managing relationships in a way that is advocated by an organisation may have significant consequences for an individual who at the same time needs to rest their body and sustain a number of other aspects of their life simultaneously, and may find themselves experiencing work intensification, burnout or performance monitoring. In other words, embedded ageing surfaces a paradox surrounding change where the need for workers to be continually flexible in adapting to change may result in health-limiting practices that make it more difficult to respond to change.

Embedded ageing may also help to identify or reconfigure aged biases within IT. Drawing on an embedded ageing approach allows us to simultaneously recognise the importance of the situated experience of particular employees across space and time while, at the same time, articulate how socio-cultural scripts are played out in the material constitution of technology. In other words, the technological systems that are developed within organisations must be seen as part of the *intra-activity* of organisational life recognising that 'distinct entities, agencies, events do not precede, but rather emerge from/through their intra-action' (Barad 2010: 267).

Situating seismic change in IT practices and possibilities must therefore be considered as a phenomenon created through individuals' practices commingling with it. For example, it is not the particular computer programme that constitutes the 'IT initiative', but rather 'the IT' as created through the fusion of individual and computerised action and practices. Rather than simply thinking about how an employee uses IT, it is the experience of this convergence that is taken as 'IT'. In relation to ageing, this allows us to depart from the user (or the IT) as a passive recipient or receptacle that is to be used or can be used

in a homogeneous or consistent way. Instead, this may take into account how an individual's orientation to IT is subject to their particular embodied orientation in a particular space, time and context. We can understand employees as 'dwelling' (Ingold 2000) in particular positions vis-à-vis IT. Dwelling suggests that our embodied position in time and space influences our own particular ways of knowing that subsequently orientate us in particular ways to certain objects or ideas such as computers or electronic systems and practices. From this situated positionality, we not only come to understand the world a particular way but are also afforded or disavowed certain possibilities that translate into our actions and behaviours. For example, if you have always experienced touchscreens (as have many individuals born after 2000), then the way you practically navigate our way around any new piece of equipment with a screen may be distinct (not necessarily better or worse) from another person who has a different 'mode of orientation' grounded in predominantly experiencing non-touchscreen products. However, it is when this orientation is translated through sociocultural attributions of value or judgement based on notions of 'familiarity' or 'competency' attributed to dwelling positions that aged biases may emerge.

This sentiment is echoed by McMullin, Duerden, Comeau and Jovic (2007) who suggest that professional IT workers themselves may express contrasting 'generational affinities' as a result of the contrasting roles IT has had throughout their life. Indeed, building on McMullin et al.'s (2007) idea, generational affinities within an embedded ageing approach may also result in aged bias being built into the actual constitution of IT within organisations. For example, what 'bodies' develop and deliver IT training, and how the IT is constructed. This may subsequently impact how various manuals and programmes are structured that has a significant impact on who the training 'speaks' to. In other words, embedded ageing may help to expose how assumptions surrounding positionality and orientation are enmeshed in IT development and subsequently become imbued with aged bias.

Conclusion: Beware of the 'Age Traps'

In this chapter, we have suggested how moving away from a focus on age as a category, or ageing as either biologically or culturally understood may present new opportunities for linking together organisation bodies, materialities and sites. On the one hand, as Thomas, Hardy, Cutcher and Ainsworth (2014: 1570) suggest, 'age works as a master signifier' in terms of informing norms, expectations and values surrounding how old one looks, behaves or

is chronologically marked. However, from our discussion of the paradigmatic fault lines upon which ageing rests, ageing within an organisational realm must consider the intermingling of different bodies, practices and contexts in order to fully understand how ageing is experienced, understood and subsequently articulated. While still in its relative infancy, concepts such as 'embedded ageing' may begin to help us explore how age diversity is part of the interwoven relationalities in which we come to understand and live in the experience of ageing at work. Ageing as a mode of sociomaterial configuration is inherent to how organisations themselves cohere. Since there is no single symbolic or material entity surrounding age or ageing that operates in isolation, age diversity practices must therefore be mindful of the various 'age traps' that exist in organisations. These age traps may include policies or practices that are imbued with perceptions or ideas about ageing and inadvertently marginalise or privilege particular points within the working life course. To this extent, moving from viewing age as attached to a fixed category or cohort that can, must or should be managed towards a consideration of how ageing effects and experiences are embedded and subsequently manifest in practice at an organisational level can bring valuable insights and points of reflection for workplaces. Doing so will not only lead to a more contextually rich consideration of the mutual constitution of ageing and organisation, but ensure that we recognise age-related policies and practices as part of a broader intra-active puzzle that we used to make sense of ageing at work.

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7

Promoting Workability for Our Ageing Population

Deirdre FitzGerald, Alex Reid, and Desmond O'Neill

Worldwide, the population is ageing. This welcome increase in longevity represents one of the most spectacular social gains of the last century. As the general population ages, so too does the working population. Older workers in employment benefit from, among other things, a broadened social network, enhanced independence, as well as a sense of empowerment and self-esteem. These benefits, in turn, have positive health effects, both physical and psychological. Age-related health problems, however, can restrict employment options for many older workers. Consequently, there are broad advantages to be realised by optimising health and introducing accommodations in the workplace to facilitate ongoing employment. As complexity is the hallmark of ageing, a key challenge is how to illuminate the need for equipoise in viewing the gains and losses of ageing for employers, and society as a whole. In this chapter, we describe the possible impact of ageing on work and employment from a health perspective, together with both medical and employer options to encourage older workers to remain in the labour market.

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Increase in Older Adults in Workplaces

Not only are people living longer than before but in general, they are more healthy, even into their tenth decade (Christensen et al. 2013). This is particularly true in more developed countries, where birth rates are also declining (Christensen et al. 2009). In 2007 in the UK, 20.7 million people were over 50 years of age (Yeomans 2011); this is expected to increase by over 20 per cent to 24.5 million by 2020 (Madouros 2006). Similarly, as the birth rates continue to fall, the ratio of older to younger adults is expected to increase from 23.8 to 29.7 per cent over the same time period (Madouros 2006).

Currently, a retiree at the age of 65 can reasonably expect to live for a further 17.8 (if male) or 20.4 (if female) years (Office for National Statistics 2011). It is not surprising therefore that the workforce is also ageing. Both now and into the future, it is expected that working life will continue to extend well beyond the traditional retirement age (Burtless and Quinn 2002; Collins 2003; Christensen et al. 2009). In 2002, 7.8 per cent of the population aged between 65 and 69 years were in employment; this increased to 12.4 per cent in 2012, an increase of 60.6 per cent (Bell and Rutherford 2013). There was also a 49.2 per cent increase in those who were self-employed in this age group over the same period (Bell and Rutherford 2013).

Although there is a significant body of thought which challenges current apocalyptic predictions about financing pensions (Shaw 2002), there is a distinct move within Europe and elsewhere to delay the age at which state and other retirement benefits can be claimed. It is an irrefutable fact that chronic disease is more common in older people, but public expenditure on managing the morbidity associated with greater longevity is not expected to rise commensurately (Bernd et al. 2013). The clear thrust of official policy from bodies such as the Organisation for Economic Co-operation and Development (OECD) is to portray the cost for providing pensions as a major challenge (Antolin 2008). This represents a major shift in attitudes up to the 1980s, where an increase in economic wealth and pension provision allowed workers to consider early retirement (Burtless and Quinn 2002; Collins 2003). In many countries, the age at which state pensions can now be accessed is rising and other pension reforms are being introduced, to encourage workers to continue to be part of the labour force for longer than was previously expected (Laun and Wallenius 2013).

This change in the demographics of the working population is also, in part, a consequence of a desire on the part of the ageing population to continue working into later life in recognition of the personal benefits and impact on their own general sense of well-being (Maimaris et al. 2010). Job type

appears to be important in this decision; more people are now employed in service-type occupations in which cognitive rather than physical demands predominate (as distinct from more traditional employment such as manufacturing etc.), and this may also influence their willingness to delay retirement (Johnson et al. 2011; Hursh et al. 2006). It has been shown that those with lower levels of educational attainment and those working in non-professional roles are more likely to retire due to disability than those in professional jobs (Lawless et al. 2015).

Many jobs now require workers to have a higher level of education and skill prior to being considered suitable for employment. Thus, younger people's entry into the labour force is delayed: this delay should increase the demand for older skilled workers. In some industries, this anticipated shortage of a skilled workforce is encouraging employers to seek ways to employ and retain older workers (White 2002; Popkin et al. 2008; Vaupel and Loichinger 2006). Aside from addressing the potential deficit in personnel, there is also an increasing recognition of the extra benefits that older workers bring to the workplace in terms of experience, wisdom and reliability.

There is no internationally recognised age at which a worker is classified as "old". Indeed, we appear to have a rather fluid concept of "old" and this is changing (Tokuda and Hinohara 2008). In some research, older workers are those who are older than 50 years of age (Daniel and Heywood 2007), and this is also recognised as the threshold at which job applicants may need more support to gain employment in the workforce (Labour Market Policy Directorate of Human Resources and Skills Development Canada 2011). However, in the USA, the Age Discrimination in Employment Act protects workers aged 40 years or greater against employment-related discrimination on age grounds (Cavico and Mujtaba 2012). Notwithstanding these apparent conflicts, it is clear that the onset of age-related health changes is very variable and imposing artificial categories is unhelpful. Ideally, supports should be available to assist both employers and employees to manage any change in health or workability throughout working lives, irrespective of arbitrary threshold age limits.

A challenge in the occupational health of older workers is the incorporation of the sciences of gerontology into those of occupational health (O'Neill and Boyle 1993). Of particular concern is the spectre of ageism, whereby older workers are inappropriately seen as less productive, more likely to be ill and a greater drain on health insurance. Two other gerontological aspects are important: the concept of ageing across the lifespan and the increase in inter-individual variability in later life. It will be increasingly important to ensure that gerontological skills are a part of the core curriculum in the training of

occupational physicians and associated staff. This necessity has already been recognised in the UK (Faculty of Occupational Medicine 2010).

Advantages of Employing Older Workers

There are recognised advantages to working with older employees; in many industries, the knowledge that comes with many years of experience is invaluable. While one of the biggest concerns expressed regarding the employment of older workers is that their productivity might be less than younger workers, there is little actual evidence that this is a genuine problem in practice.

A large study examining the relationship between age and productivity found that productivity was at a maximum between the ages of 30 and 45 and that productivity outside this age range was reduced by comparison, with workers under the age of 25 years showing the lowest productivity (Van Ours and Stoeldraijer 2011).

Productivity between workers is highly variable in any case and is dependent on a number of factors. Where productivity in older workers declines, this is generally as a consequence of a physical deficit rather than a cognitive one (Wei and Richardson 2010). However, any such decline is thought to be minimal (Van Ours 2009), if it occurs at all (Zacher et al. 2010, Hursh et al. 2006). Indeed, in some industries, older workers are more productive than younger workers. Older academics, for example, tend to publish more than their younger colleagues (Kristjuhan and taidre 2005). Also, there is no strong evidence for an increase in a pay–productivity gap as the age of workers increases (Van Ours and Stoeldraijer 2011, Van Ours 2009), which indicates that employing older workers is cost-efficient.

Among older workers, declines in cognitive abilities and physical strength where they exist are likely to be compensated for by an increase in work experience and use of accommodations or adaptive work strategies (Hursh et al. 2006) and natural transition to roles that are less physically demanding. Greater work experience and conscientiousness, a preference for positive emotional experiences and social relationships as well as changes in goal orientation are all likely to impact positively on older workers' job performance (Gleeson et al. 2013). Additionally, older workers act as mentors for younger workers and can increase team productivity (Brooke and Taylor 2005).

Other characteristics of the older individual are also beneficial to employers. Older workers tend to be loyal to their employers (D'Amato and Herzfeldt 2008), and this commitment is likely to mitigate any decline in productivity attributed to age (Iun and Huang 2007). Compared to younger workers, who

are more likely to leave work contracts (Josephson and Vingard 2005), they are more likely to be willing to continue working for the same organisation into the future. While there are some conflicting findings, it has also been shown that older workers experience less work–family conflict (Josephson and Vingard 2005) and are more resilient to the challenges of change in the workplace (Neupane et al. 2014). This resilience may account for some of the research which has shown that older workers experience less stress (Costa and Sartori 2005) and lower levels of self-rated burnout than their younger colleagues (Cheng et al. 2013).

There is no clear relationship between age and sickness absence. Older workers may require more long-term sickness absence from work than other workers (Yeomans 2011), in keeping with the increased prevalence of chronic health conditions experienced by this population. Younger workers, however, have more frequent short-term sickness absence than their older colleagues (Taimela et al. 2007, Josephson and Vingard 2005, Yeomans 2011). Use of the Bradford Factor by managers, which measures the disruption of an individual employee's absence pattern (Taylor et al. 2010), highlights that it is frequent short-term absences, typically associated with younger workers, that are generally regarded as more disruptive to organisations than occasional long-term absences that are more usual in older workers.

Some organisations recognise the benefits of retaining older workers in employment and capitalising on their strength. This ensures ongoing continued access to their “experience of problem solving” and “wealth of experience” (Brooke and Taylor 2005) as well as institutional or corporate familiarity (Hursh et al. 2006) and awareness of previous industrial skills and processes (Kantarci and VanSoest 2008). Even with succession planning, it is not easy to compensate for the loss of such expertise and the potential impact on productivity.

Advantages of Employment for Older Workers/ Well-Being

Where people have been forced to retire, or even partially retire, they tend to be less satisfied than people who have retired by choice (Bender 2012). This supports the recommendation that retirement should be a phase in life that is pursued when individual workers feel it is appropriate for them, rather than to have that decision made by some other arbitrary factor, such as a state entitlement to pension funds.

Among a group of National Health Service (NHS) employees who retired on the grounds of ill-health, within just one year of retirement, 13 per cent had returned to employment (Pattani et al. 2004). Only 9 per cent reported an improvement in their health status as the reason for them returning to work. Some indicated that they had simply become bored at home or that they felt a need to re-integrate into society. Over 40 per cent returned to a job that was either the same or very similar to their original position. A similar figure indicated that financial difficulties had been a motivator for them choosing to return to work.

Aside from financial concerns (Schofield et al. 2012), role loss in older age, through redundancy, unemployment or even retirement, is associated with poorer health (Artazcoz et al. 2010, Gallo et al. 2006). Involuntary job loss is associated with an increased risk of both myocardial infarction (hazard ratio 2.48, 95 per cent CI 1.49–4.14) and stroke (hazard ratio 2.43, 95 per cent CI 1.18–2.98), even allowing for other predictive variables such as diabetes and cigarette smoking.

It is thought that delaying retirement can have a positive impact on cognitive function as retirement appears to accelerate cognitive decline (Bonsang et al. 2010). The risk of age-related cognitive decline can probably be modified by increased work-related mental stimuli (Bosma et al. 2003), and it is thought that the natural mental stimulation provided by working in later life may provide some protection against the onset of dementia (Fratiglioni and Wang 2007). After retirement, older people no longer have the same incentive or necessity to devote resources to cognitive repair activities (Mazzonna and Peracchi 2012); thus, they are more likely to experience an increase in the rate of cognitive decline.

Physical function declines more slowly in older adults (aged 56–85 years) engaged in full-time work than in those who have retired (Stenholm et al. 2014), irrespective of age, morbidity, physical activity, smoking, education level or other lifestyle risks. Possible explanations for this observation include the fact that older adults who are working continue to remain active on a daily basis through their work. It is also possible that in some jurisdictions, remaining in work facilitates access to superior healthcare resources. Social supports and social participation provided by remaining in work are also likely to influence physical function rates.

The subjective evaluation of ageing by individuals themselves may influence their desire to continue working (Fasbender et al. 2014). Older workers however, generally continue to view their work as satisfying and important and express commitment to their organisations (Webber and Smith 2005).

Health Issues Associated with Ageing in the Workplace: The Physical and Biological Influences of Ageing on an Individual's Ability and Performance at Work

There is conflicting evidence regarding whether there is a higher prevalence of self-reported physical problems reported by older workers (Taimela et al. 2007; Ng and Feldman 2013). Although productivity remains high, older workers may experience changes in physical health indices such as elevated blood pressure or cholesterol levels (Ng and Feldman 2013) and report more health concerns than younger workers (Broersen et al. 1996, Lee et al. 2012). They do not however appear to suffer more from mental health problems than their younger colleagues (Ng and Feldman 2013). Also, there is little evidence of any association between age and complaints regarding working conditions or either physical or mental work task demands (Broersen et al. 1996, Josephson and Vingard 2005). This may be explained by selective turnover of older workers, particularly in work that is subjectively considered to be demanding (Broersen et al. 1996). However, it is also worth bearing in mind that work experience and motivation are also likely to protect against individual work concerns.

In older workers, prolonged work participation rates are similar between those with and without chronic disease, irrespective of working hours per week, depressive symptoms, age and having a sense of mastery or good coping abilities (Boot et al. 2013). There is little evidence of an association between age and the need for work modification when returning to work following an injury (i.e. reduced hours, altered physical demands etc.) (Pransky et al. 2005).

While many of the physiological changes associated with ageing can be ameliorated by increased physical activity, increased intellectual activity and attention to lifestyle factors (Crawford et al. 2010), it is important to also consider the impact of the typical physical, cognitive or sensory morbidity associated with ageing on workability and the need to change work practices to accommodate the different physical and cognitive capacities of older workers (Ilmarinen and Rantanen 1999, Crawford et al. 2010, Hursh et al. 2006).

Job analysis, in consultation with employees, will assist in identifying any difficulties likely to be encountered by older workers, and indicate where ergonomic redesign, assistive technology or other job accommodations could be of benefit. Frequently, workers who have noted a work difficulty will already have made informal changes to their work practice.

While occupational health has traditionally focused on the health, safety and welfare of workers aged between 18 and 65, as we are working into later life, additional challenges for occupational health may arise (Chan et al. 2000, Arnold and Edgar 2006). The Black Report on occupational health in the UK emphasised the importance of occupational health and early intervention for those who develop a health condition so that supports are available for those with the potential to work (Black 2008); the report also noted that many people work beyond the state pension age, and raised the issue of occupational health supports for those outside the traditional remit of occupational health, such as the self-employed and the unemployed..

Specific Health Considerations

Physical Fitness and Work, Including Cardiovascular and Musculoskeletal Considerations

As we age, our physical work capacity decreases (Ilmarinen 1992b). Starting in our early 30s, VO₂ max (the maximum oxygen consumption, used as a measure of aerobic capacity) decreases in men by 0.40 ml/kg/min per year and by 0.44 ml/kg/min per year in women (Bugajska et al. 2005). In general, there is a reduction in aerobic capacity of 10 per cent each decade in life (Crawford et al. 2010). Thus, it would be expected that as workers age, their ability to undertake work that is physically demanding declines.

Musculoskeletal capacity also decreases as we get older (Ilmarinen 1992b). The practical implications of this are not clear, however, as age appears to have only marginal effects on muscle fatigue during repeated experimental isometric efforts (Yassierli and Nussbaum 2009), as may be required during manual handling.

While it is important to be mindful of the natural physiological changes associated with ageing and the potential need to make suitable workplace accommodation to optimise the productivity of older workers, there is very limited published research which specifically looks at ergonomic requirements in older workers; most research in this field has focused on typical industrial populations, which often don't consider elderly workers (Imrhan 1994). It has also been noted that suitable working environments and reasonable work demands are not particularly different for older workers compared to younger workers (Chan et al. 2000). However, in individual cases, formal functional and workplace assessments may be useful especially where a worker has been diagnosed with a chronic physical medical condition.

Although it may be reasonable to conclude that the reduction in aerobic capacity (Crawford et al. 2010) could impact on the ability of some older workers to accomplish physical work tasks, this should not be viewed as a rule of thumb that applies to all. Among blue-collar workers, older workers have reported doing work with similar subjective physical demands as their younger colleagues, requiring similar energy expenditure and achieving similar heart rates during work (Louhevaara 1999). Furthermore, this problem can be overcome to a certain degree by engaging in regular activity and worksite physical training (Kenny et al. 2008).

Worksite health promotion, such as fitness programmes, can influence aerobic fitness, muscular strength and overall flexibility (Shephard 2000), which would be expected to impact on physical work abilities and fitness. In older people with coronary heart disease or hypertension, addressing psychosocial supports, both in work and at home, is important to encourage workforce retention (Jedryka-Goral et al. 2005). Obesity has also been shown to be a factor which predicts early exit from the workforce (Hopsu et al. 2005, Mosca 2013; Pohjonen 2001), so this too should be addressed in worksite health promotion initiatives.

Sensory Deficits: Hearing and Vision

Older populations, even those with hearing classified as normal, tend to have greater difficulty with speech discrimination in the presence of background noise (Rajan and Cainer 2008). Having poor hearing also increases the risk that an older worker will experience a work-related injury, even if they wear hearing aids (Zwerling et al. 1996, Zwerling et al. 1998). Modern assistive technology can be utilised to counteract this, for example, visual alarms and/or tactile message delivery systems can be introduced to warn affected workers about emergencies and to herald announcements.

Due to presbyopia, older workers are more likely to depend on reading glasses (Chan et al. 2000), and as workers age, they are more likely to report difficulty with their vision, even if wearing glasses (Broersen et al. 1996). Furthermore, cataracts and maculopathy also tend to affect older workers more than their younger colleagues. Working in a role that requires the worker to have good vision is a risk factor for experiencing a work-related accident in older workers, even if they wear spectacles (Zwerling et al. 1996, Zwerling et al. 1998). Although colour perception tends to remain constant as people age (Werner 1996), colour discrimination reduces, as does glare tolerance, and darkness adaptation is delayed (Knoblauch et al. 2001, Chan et al. 2000). Fortunately,

these potential difficulties can be addressed relatively easily by employers, for example, by facilitating the use of screen magnification, modifying contrast and/or using larger print (Hursh et al. 2006).

Cognitive Changes with Ageing

A classic difficulty with ageing, even in gerontology, is the failure to recognise the cognitive gains of ageing (including wisdom, altruism, better strategic thinking and prudence) as well as the losses. A recent review of how normal cognitive ageing is covered in textbooks of gerontology and geriatric medicine makes for dispiriting reading—almost none mentioned the gains associated with ageing (Robinson et al. 2012)!

It is well-recognised that dementia and cognitive disorders often remain undiagnosed in patients in the community (Connolly et al. 2011), and by extension, an emerging topic of concern is the potential interface between one of the key syndromes of later life, dementia and an ageing workforce. It is increasingly likely that, as the workforce ages, people with possible cognitive impairment will be found in the workplace; however, the numbers are likely to be modest. Assessment to diagnose an impairment as well as clarify what cognitive areas are most affected will be required to ensure that the necessary supports can be provided to enable workers to continue working (Mair and Starr 2011).

Interpreting measures of cognitive performance can be challenging, not least because there is an association between education level and test score results (Crum et al. 1993). To address this, the National Adult Reading Test (NART) is regarded as a useful tool to assess prior intellectual ability (Crawford et al. 2001). Signs of cognitive decline can be found on clinical assessments of middle-aged adults (Singh-Manoux et al. 2012). Although cognitive ageing likely begins in early adult life, cognitive ability is only one of several elements which contribute to practical functional performance (Salthouse 2004). Motivation, personality and diligence are also likely to influence functional abilities. Therefore, assessment of cognitive function alone is a poor predictor of medium-term functional status in older adults (Van Hooren et al. 2005).

The consequence of being diagnosed with a cognitive deficit will have significant implications on all workers, particularly those working in the liberal professions, such as architects, doctors, engineers, lawyers, pharmacists and veterinary surgeons (Bartley and O'Neill 2010). They generally work into later life, their occupation requires complex decision-making and they often work independently without access to formal occupational health services.

There is only limited support available from professional bodies (Fitzgerald et al. 2013), whose main interest is protecting the public rather than supporting the individual professional.

Against this, delayed diagnosis of dementia or cognitive disorders in these occupational groups will potentially have harmful consequences for their clients or patients. Early recognition of dementia is difficult for the reasons outlined above, that is, the high levels of education required for these professions are thought to potentially delay the onset of dementia (McDowell et al. 2007, Meng and D'Arcy 2012, Ott et al. 1995) and also may mask the illness in the early stages. This may be further compounded by the frequent lack of insight into the problems encountered (Graham et al. 2005, Oyebode et al. 2007), which is common in dementia. Also, there are difficulties distinguishing between the changes associated with normal ageing, mild cognitive impairment and dementia (Bartley et al. 2011, Petersen 2011). To compound matters, functional cognitive deficits might not be obvious in the typically prolonged preclinical stages of disease, when people are liable to subconsciously alter their work and home environments to counteract cognitive difficulties and the consequent problems in completing activities of daily living, for example, by writing lists to offset memory problems, thus hiding any subtle signs of illness from family and colleagues.

When dementia is diagnosed in an individual who is still at work, it is often in the workplace that the diagnosis is first noted publicly (Braudy Harris 2004). Some people successfully remain in the workplace, although their responsibilities may need to be modified (Braudy Harris 2004). In one study of patients with Parkinson's disease, where patients were less than 70 years of age and disease duration was less than four years, almost 90 per cent were able to remain in work (Jasinska-Myga et al. 2012), and predictors for loss of ability to continue working included the presence of intellectual disability as well as other significant markers of disease such as tremor, rigidity, or bradykinesia.

There is evidence that among professionals, making decisions regarding retirement is often influenced by subjective increasing difficulties with memory (Bieliauskas et al. 2008). Subjective concerns regarding cognitive performance, however, are not always associated with an objective cognitive decline (Bieliauskas et al. 2008). If people with dementia must retire, loss of a meaningful occupation can have a negative impact psychologically (Braudy Harris 2004).

Irrespective of age, higher levels of cognitive stimulation, both in work and at leisure, improve cognitive efficiency (Marquie et al. 2010). Thus, working in jobs that are regarded as cognitively demanding is likely to have a beneficial influence on cognitive ageing.

Hours of Work and Shift Work

While multiple studies have examined the impact on working overtime hours on older workers' health, there is no strong evidence that older workers' health is compromised by longer working hours in general (Allen et al. 2008) unless the hours being worked are excessive (i.e. >60 h per week) (Crawford et al. 2010). With increasing age, however, workers may require additional recovery time between work shifts, especially if working longer hours (>42 h per week) and doing particularly demanding physical work (Crawford et al. 2010). This requirement tends to peak at 55 years of age. Among the oldest employees, that is, above 56 years of age, the need for recovery tends to decline (Mohren et al. 2010).

Although the sleep requirement for older people is generally less than that required for younger people, concern has been expressed regarding the impact of shift work on workers' health, particularly in older workers. It has been demonstrated, however, that although older workers experience more sleepiness after several consecutive night shifts than their younger colleagues, they tend to be less sensitive than younger workers to acute sleep loss (Harma 1996). Also, older workers often have fewer family responsibilities and more experience with coping with sleepiness, which contribute towards assisting them managing the consequences of sleep deprivation (Harma 1996).

The Work Ability Index is a validated instrument which is designed to identify workers' subjective attitudes regarding their work demands and their health status (Ilmarinen 2007). While shift workers of all ages report lower work ability index than exclusive day workers, the difference experienced in the work ability index between day and shift workers is increased among older workers (Costa 2005, Costa et al. 2005). That being said, older workers whose usual 8-h work shifts were changed to 12-h work shifts (including both day and night time shifts in both shift rotations) did not report significantly different fatigue measures than their younger colleagues (Keran et al. 1994). Additionally, the fatigue experienced by older workers did not accumulate and both mood and subjective performance either remained static or improved as the work week progressed. Although working unusual hours, that is, before 6 am or after 10 pm, impacts on cognitive efficiency the following day, there is no indication that this is more pronounced as people age (Ansiau et al. 2005).

While there is some evidence to recommend that older shift workers be allowed to selectively work the morning shift (Costa 2005), it has also been demonstrated that older workers are more likely to be injured while working the morning shift, that is, between 6 am and 2 pm, than if working in the afternoon or night (Zuzewicz and Konarska 2006). Therefore, it is not

possible to argue that older workers require particular shift patterns, and instead, consideration should be given to individual well-being and personal preference.

In general, workers favour flexible hours where they have some autonomy over their working arrangements (Costa and Sartori 2005); subjectively, flexible working arrangements are associated with better self-rated health measures. There is no reason to believe that this is not equally true of both older workers and their younger colleagues.

Accidents

Accident data generally do not provide information relating to whether lack of strength, sensory problems, co-ordination deficits or balance impairment contributed to the reported accidents (Imrhan 1994). While the types of accidents reported by workers may differ by the age of those involved (Chau et al. 2010), older workers tend to be involved in fewer accidents and injuries than younger workers (Farrow and Reynolds 2012, Breslin and Smith 2005, Cloutier et al. 1998, Crawford et al. 2010, Salminen 2004, Laflamme et al. 1996). Adolescents and young adults are more likely to report sustaining an injury while in work in the previous 12 months than older adults; this difference is not explained by working in jobs which would be considered to be more dangerous (Breslin and Smith 2005).

Credible explanations for a reduction in injury rate in older workers include an increased familiarity with work tasks, patience and a higher skill level than younger workers. Older workers also show an increased regard for safety (Siu et al. 2003) which is also likely to be protective (Chau et al. 2010).

Older workers appear to suffer more serious injuries and workplace fatalities than younger workers (Crawford et al. 2010, Laflamme et al. 1996, Walters et al. 2013, Myers et al. 2009, Pransky et al. 2005, Salminen 2004), and when injured, require more time to recover and return to work (Crawford et al. 2010, Kemmlert and Lundholm 1998, Peele et al. 2005). Despite this, older workers do not appear to miss more days from work owing to suffering from musculoskeletal diseases following injury (Peele et al. 2005) and younger workers are more likely to perceive that the injury negatively impacted on their quality of life (Pransky et al. 2005).

Among older workers, a greater incidence of work-related accidents is reported in those who have mobility challenges, for example, difficulty getting up after sitting or difficulty stooping (Zwerling et al. 1996). Those taking sedative medications including narcotic and non-steroidal medication and

those who suffer other health problems or have suffered a previous injury (Voaklander et al. 2006) are also at increased risk.

Slips, trips and falls tend to be among the most commonly reported workplace accidents. Factors contributing to such accidents, such as wet floors and unsafe ladders, have been cited as concerns for both young and older workers (Kemmlert and Lundholm 1998). Therefore, preventative measures to mitigate against injury in older workers are also likely to be of benefit for their younger colleagues.

Older workers who are self-employed are less likely to experience a work-related accident than older workers who are hired by someone else (Zwerling et al. 1996). This likely is due to the increased control that those who are self-employed have over the role and work conditions, allowing them to avoid duties they feel less able to do. Thus, active health interventions are also likely to reduce work injury rates.

Overcoming Prejudice and Other Social Issues Associated with Ageing in the Workplace

In America, over 80 per cent of older workers report experiencing workplace discrimination within the previous year (Chou and Choi 2011), although this was higher in those aged 50–64 years (84.5 per cent) than in those greater than 65 years of age (65.7 per cent). Over 60 per cent report being given jobs unfairly, which other employees did not wish to do. Almost 40 per cent reported feeling as if they were under greater scrutiny than other colleagues and almost 50 per cent believed that they were not taken seriously by their boss. Older workers employed in crafts, labouring or military service were more likely to perceive that they had been victims of discrimination based on their age than those employed in other sectors, such as professionals or those working in clerical or sales positions.

Ageist stereotypes unfortunately exist; although the actual number of older people with significant cognitive impairment in the workplace is likely to remain low, all cognitive changes associated with ageing are regarded negatively. It has been shown that some managers regard older workers as more difficult to train, overly cautious and slower to adapt to new technology and changes in the workplace (Brooke and Taylor 2005). For example, it has been suggested that older workers have less interest in computer technology (Marquie et al. 1994). However, studies have shown that older workers do not tend to make more computer-based errors than younger workers (Birdi and Pennington 1997); although older workers may make more errors that

require intellectual regulation than their younger colleagues, the association between age and error rate is weak.

Some employers may be reluctant to support older employees on a gradual retirement programmes (Kantarcı and VanSoest 2008); reported reasons include fixed costs (e.g. insurance premiums that do not decrease substantially with reduced hours), scheduling challenges and the potential difficulty of maintaining the necessary skill set while working fewer hours. This is compounded by a reluctance to fund training for employees who may not be able to provide a substantial return due to working reduced hours.

By contrast, where management have a supportive attitude and are willing to mitigate against any potential deficiencies in the performance of older workers, this has a positive impact on the view of older workers in that business (Streb and Gellert 2011). The value of older workers to their team and colleagues in such organisations increases. There is less conflict between managers and workers when the workers regard that their managers are of a similar age to themselves.

It is recognised that workplaces should develop policies that are “age aware”, recognising the needs of all employees, not just older employees. In this way, the skills of individual workers can be explored and enhanced to ensure that each worker’s output is optimised independent of their age (Brooke and Taylor 2005). Thus, the complementary skills and attributes of all workers can be promoted.

There is no doubt that assistive devices enable some workers to work when older. The majority of such devices are simple and welcomed by users. Some, however, require a complex combination of physical resources, including sensory, cognitive and motor skills, which may in themselves generate their own challenges. Additionally, assistive devices are often designed for specific tasks rather than a range of different tasks in the workplace. This may restrict older workers from being moved or rotated through different work areas. For these reasons, appropriate information and worksite-specific training about the device should be provided to both the end user and the local manager to ensure that any limitations are fully understood.

Age-Attuning the Workplace

Imaginative proposals have emerged in Finland for age-attuning the work place and occupational health services (Ilmarinen 2001, Ilmarinen and Rantanen 1999). Gradual retirement options, including flexible or part-time working arrangements, may inspire some older workers to continue working beyond the standard state pension age (Cebulla et al. 2007).

Most people would prefer to smoothly move from full working life to retirement gradually rather than to suddenly stop working (Kantarci and VanSoest 2008). Initiatives in this area include *phased retirement*, where the worker remains working for their usual employer on a reduced schedule, for example, job sharing or on consultancy basis and *partial retirement* in which the employee leaves their prior employer and moves to another job or self-employment, usually with a reduced wage or work schedule.

A gradual reduction in working responsibilities through these avenues also opens up other options to workers, including continued employment for longer than perhaps they had originally intended. Planning for this less defined retirement requires recognition of workers' own preferences, both in terms of ensuring the provision of roles that are attractive as well as salary options that are desirable. Gradual retirement has the potential to increase the lifetime contribution of workers, both in a service and financial sense, thus increasing the potential labour supply and facilitating the sustainability of the pension system, respectively. In some jurisdictions, a partial-pension-receipt-supported pension is possible, whereby the reduction in working hours and consequent reduction in pay is compensated by receipt of a portion of the full pension payment.

Health and social welfare policies which encourage healthy ageing represent an important approach in protecting against the loss of the workforce at arbitrarily appointed timescales. The focus should be on encouraging participation in the labour force by being mindful of any difficulties which may be encountered by older workers. Also, employment prospects for older workers are improved when "on the job" training options are available (Picchio and Van Ours 2013).

Programmes have been developed in some areas which are specifically designed to assist older people in finding employment. Unfortunately, these can be counterproductive, as they can contribute to the development of negative self-identities (Berger 2006). Additionally, they may encourage participants to develop a reliance on those delivering the programme, thus reducing their confidence and their willingness to seize opportunities for employment independent of the programme.

Many countries have introduced laws to protect against age discrimination in employment matters. Although well-intentioned, this type of legislative approach frequently does little to encourage employers to hire older workers (Adams 2004). Also, where such laws specifically protect certain age categories, there is evidence that workers outside of these age categories can be subject to discrimination; thus, these laws do not appear to have assisted in altering stereotypes or encouraging employment of older people outside of legal constraints. Elsewhere, governments have developed tools for managers and offer support to encourage age-diverse employment practices (Ziekemeyer 2005).

It is important that these initiatives address the concerns of employers, such as doubts regarding productivity or anxieties regarding accidents or illness. Furthermore, such developments should not appear to undermine the genuine commitment that many older workers have to their employers (Brooke and Taylor 2005). If employers can recognise the natural growth that comes with age and modify jobs and training so that older workers can maximise their learning, jobs can become “age-proofed”. Prejudice should be minimised and job flexibility and other workplace considerations may also be useful.

Government policy should also recognise the needs of the self-employed. Older workers who are self-employed are less likely to retire than workers of the same age who are working in salaried or waged jobs (Zissimopoulos and Karoly 2007). Also, the rate of self-employed people increases with age. Some people move from salaried to self-employed work if they feel that their health has deteriorated and that work is impacting on their health.

Rather than using age as a criterion in the evaluation of workability, it is now accepted that competence and individual performance are more appropriate and valid measures of employability (Van Der Heijde and Van Der Heijden 2005). Thus, occupational experience, flexibility, a willingness to optimise skills, adaptability to different organisational settings and motivation are better indications of how an individual will perform in the workplace (Van Der Heijde and Van Der Heijden 2005, Ilmarinen 2001).

At a local level, external factors which may influence work ability for any given individual include the demands of the job, work supports and management policies (Ilmarinen 2001). Work ability can be optimised by providing training for supervisors on successful age management, ensuring appropriate ergonomic modifications, providing health promotion and exercise programmes in the workplace and facilitating training which is appropriate for individual workers, enabling them to become proficient with newer technological advancements relevant to their work. These will help to encourage older workers to remain in work and ensure ongoing productivity and work of good quality, as well as safeguarding worker well-being and quality of life.

Health

Employers, senior managers and occupational health professionals need to be mindful of the physical changes associated with ageing that may impact on workers’ abilities to undertake work tasks (Ilmarinen 1992a). A predictor of early exit from the workforce is poor physical fitness (Pohjonen 2001), which may be offset by the provision of an exercise and muscle-strengthening

programme. These have been shown to delay declines in the work ability index and deteriorations in health and physical capacity, irrespective of age (Pohjonen and Ranta 2001). However, there is little doubt that the physical demands of work may need to be decreased accordingly (Ilmarinen 2001). This should be done in a fair, evidence-based fashion, both for older workers and for those who cannot maintain their fitness for their work tasks for other health-related reasons. To counteract ageism and to replace age-related retirement decisions, the Royal National Lifeboat Institution (RNLI) introduced fitness-based work capacity assessments (Reilly and Tipton 2005). The particular job requirements were considered and minimum performance standards and task-related fitness requirements were determined. Crew members are assessed according to these minimum standards.

Lifestyle

Lifestyle factors, such as obesity, have also been shown to predict early exit from the workforce (Hopsu et al. 2005, Pohjonen 2001). Both being overweight and being underweight are associated with an increased incidence of reports of physical strain attributed to excessive job demands (Landau et al. 2008). Being active outside of work and engaging in hobbies protects against early retirement (Seitsamo 2005).

While older workers may need longer than younger workers to recover from work, factors other than work demands appear to have an impact on subjective recovery requirements (Kiss and DeMeester 2005, Kiss et al. 2008). For example, younger workers rate support from colleagues as a mitigating factor (Kiss and DeMeester 2005). Other social and personal issues are also thought to influence work recovery requirements, including having demands outside of work, for example, caring for dependents or other relatives (Kiss and DeMeester 2005). A spouse's retirement also influences workers retirement plans (Seitsamo 2005). It would therefore be important to approach recovery from work demands from a multidisciplinary perspective, looking both at the working environment as well as competing demands and motivating factors.

Attitudes Towards Work

Workers are less likely to continue working after usual retirement age if they regard their job as physically demanding (Wohrmann et al. 2013). Among healthcare workers with musculoskeletal conditions intending to retire early, working conditions are generally subjectively regarded as poor (Cotrim et al. 2005).

Older people also place judgements on the ageing process. These judgements can be both positive (i.e. increased self-knowledge and acceptance) or negative (i.e. social loss). These judgements influence whether workers remain in the workplace beyond retirement age (Fasbender et al. 2014). It is therefore essential that the individual worker's judgement regarding the ageing process is considered when planning for work beyond the traditional retirement age.

As age increases, workers are more likely to expect that they will be capable of remaining in their job until retirement (Molinié 2005). A number of reasons have been proposed for this: as workers age, it may be that they have already made modifications to their jobs such that the more challenging elements have been removed; also, if closer to retirement, the remaining time required in work is less so it may appear more achievable to continue to work until that time. Additionally, motivations and priorities may change with age. Older workers appear to be motivated by different work factors than younger workers (Delange et al. 2010); personal principles tend to become more important, whereas power and competition become less so (Inceoglu et al. 2012).

Possibilities for development, responsibility to colleagues, a sense of influence, having work which is considered meaningful and agreeable are all likely to reduce the desire or need to retire (Seitsamo 2005).

As workers who are dedicated to their companies have been shown to apply themselves to their work and consequently moderate any decline in productivity associated with age (Iun and Huang 2007), managers should find ways of encouraging employees to feel that commitment to their organisations. A socially supportive working environment also encourages workers to consider working into older age with their employer (Wohrmann et al. 2013).

Older workers employ a variety of tactics to manage the perceived discrimination experienced in the workplace (Grima 2011). Workers who "stand back" from making judgements regarding discrimination take comfort in recollections of their own prior careers and successes and have a sympathetic attitude towards their younger colleagues who may have a greater risk of unemployment in their professional life course and who have already had to pursue lengthy advanced education tend to manage any perceived discrimination better.

Training

Along with ensuring that workers are trained appropriate for their roles, managers may also benefit from training to specifically assist them in optimising the performance of older employees (Popkin et al. 2008).

Much of the effort to retain older workers has been motivated by observations in certain industries that there were shortages of skilled personnel, for example, in the transportation sector in the USA (Popkin et al. 2008) or in the healthcare sector (White 2002, Buerhaus et al. 2000, Buesa 2009). This shortage encouraged employers to find ways to encourage older workers to remain in the workplace.

Irrespective of age, training in employment matters should be tailored to meet the needs of the workers. Modification to training which may favour older workers (Hursh et al. 2006) includes scheduling training in short sessions over multiple days rather than having full days of training. Training where workers have the opportunity to “experience” the new skill “reinforces the skill attainment”; this in turn will increase older workers’ confidence. When training is in small groups, this affords greater practice opportunities. Also, workers who are older may prefer the training to be conducted at a slower pace or self-paced (Popkin et al. 2008). As older workers may experience a decline in attention control and are therefore more likely to have difficulty avoiding external distractions while learning (Schwerha et al. 2007), training should be designed such that both visual and auditory distractions are minimised. Practicing the new skills and simulation of work should be closely supervised by trainers so that errors can be corrected early before they become engrained and practice of the correct or required performance is encouraged. Obviously, if workers suffer from sensory impairments, such as hearing or vision deficits, training should be designed so as to ensure that the training is not compromised by the impairments. Refresher courses should also be considered, as should retraining opportunities.

Where workers are engaged in physically demanding work, physical training programmes are expected to protect against both the physiological decline in physical capacity which is a natural part of ageing and any risk of injury associated with work (Kenny et al. 2008). Regular exercise also assists in maintaining aerobic capacity and respiratory function. Aside from worksite-based fitness schemes, workplaces are in a good position to devise health promotion programmes which encourage an active lifestyle outside of work.

Work Ability Index

It has been proposed that the work ability index score could be used to identify workers who may benefit most from changes to working conditions or modifications to work roles to limit their exit from the workforce (Cotrim et al. 2005, De Boer et al. 2004, Hopsu et al. 2005, Williams and Crumpton

1997). For the reasons discussed above, the work ability index tends to decline with age in both men and women and is influenced by the reported presence of disease (Costa et al. 2005).

Workers themselves are often able to predict whether they will remain in work in the coming years based on their subjective capability to do their job (Molinié 2005). If workers rate their own health as poor, they are more likely to expect that they will retire early, although that may be at some point in the future.

Aside from health complaints, workers often cite other concerns which they expect will limit their retention in the workplace (De Boer et al. 2004, Ilmarinen et al. 2005). These include excessive work demands, work-related stress, conflict with supervisors, too little work and monotonous or dull work (De Boer et al. 2004). Other factors that have been shown to influence workers expectations that they will not be able to continue working include subjective evaluations of the demands in the workplace, perceptions that work is highly physically demanding as well as work hours that are incompatible with a desired lifestyle (Molinié 2005). A negative perception of the value or meaningfulness of their work also influences workers' expectations of retirement, as does a lack of responsibility, poor colleague support, disregard from management for prior work experience and the absence of promotion prospects.

Both disability pension rates and non-illness-based pension uptake also guide workers' future work intentions (Karpansalo et al. 2002).

Interestingly, other work challenges, such as working overtime, a requirement to complete dangerous work tasks, low job autonomy and suffering from musculoskeletal complaints are not necessarily associated with an expectation that early retirement will be pursued (Hengel et al. 2011).

Workplace Adjustments

Ageing workers, their colleagues and their families should be able to access advice to assist the worker in their work practice, including remaining in work where possible.

Preventative measures ought to be introduced for workers at all stages of their working lives. Where strategies to develop healthy working environments for all workers are developed, injuries may be prevented in older workers, but will also promote healthy working practices in younger workers which may serve to limit future disability or long-term cumulative effects (De Zwart et al. 1997).

Employers should be prepared to offer proactive disability management; for older workers, this would include involving workers in processes that prevent disability, improve skills and prioritise the quality of working life for employees (Hursh et al. 2006).

Worksite health promotion can proactively promote health by providing information and incentives to employees so that they can address health concerns including blood pressure, hypercholesterolaemia, obesity, smoking and mental stress (Shephard 2000). Employer-provided health promotion activities may also reduce employee fatigue and need for recovery after work (Strijk et al. 2012).

Additionally, consideration should be given to working hours (Popkin et al. 2008). Flexible working arrangements and part-time work which is attractive will help to encourage older workers to remain in the workforce (Popkin et al. 2008).

Changes in management which support healthy ageing in the workplace include encouraging a positive attitude towards ageing, supporting individual and team work, individually tailored work which takes account of limitations and strengths of each employee and transparency regarding changes in work practices (Ilmarinen and Rantanen 1999).

Where older workers suffer an injury, return to work programmes are particularly important to ensure that the employee sees a way to returning to work (Hursh et al. 2006). It is vital that the employer remains in contact with older workers who are absent from work on sick leave. When returning to work, it is important that strategies are implemented to reassure the worker that re-injury is not expected. If necessary, open discussion regarding alternative positions, further training opportunities, workplace accommodations and part-time work are conducted.

Human resource practices for older employees should facilitate career development by enabling career mobility and providing training, introduce more flexible work practices and ensure that employee relations, including preventing harassment and prompt introduction of procedures for grievances, are optimised (Saba et al. 1998). Older workers place a high value on being recognised for their work (Saba et al. 1998). It is important that older workers are made aware of ongoing work opportunities, that is, possibilities for career progression, as such opportunities have been shown to motivate older workers and improve their work performance (Zacher et al. 2010).

Professionals and workers who require extensive training tend to enter the workforce later, resulting in a higher age profile in some professions than in less skilled positions. Consequently, there is a potential for an even

greater need to retain workers in these occupational groups (White 2002). A fine balance is required in developing professional approaches to cognitive disorders in an ageing work force. While there is a need to protect both workers and their clients, a cautious approach is required to avoid feeding into ageism and discrimination relating to older workers that already exists. Individual professionals need to be aware of the potential impact of health on work and that this can become more marked as one ages so that they can have a plan in place to prepare for this. Professional bodies should also consider this matter (Fitzgerald et al. 2013), particularly as the changing age demographic increases the likelihood of practitioners developing health problems while working. Ideally, each profession should put appropriate structures in place to enable support to be provided proactively, prior to a complaint or civil litigation being initiated due to an error. Such supports need to be available in such a way that they can be accessed easily, including following self-referral.

Among managers and professionals, career satisfaction and perceived organisational support have been shown to increase older workers' intention that they will remain working for that organisation (Armstrong-Stassen and Ursel 2009). Organisations are more likely to be regarded as supportive if they continue to provide access to training for older workers and continue to present challenges and opportunities for career development, rather than allowing career stagnancy to develop.

In some industries, older workers can be observed to transition to less physically demanding roles as they age, while younger workers are employed to complete the more physical tasks (Landau et al. 2008, Oginska et al. 2005). Ergonomic considerations in workplaces, however, should ensure that the working environment is appropriate for all workers, including older workers (Popkin et al. 2008). When tools are suitably designed, with attention to handle shape and tool weight, for example, and workers are confident with their use, productivity improves.

Other suggestions for changes to work which benefit older workers include designing work so that it does not require an excessive working memory, is not physically strenuous and is not dependent on rapid information processing (Griffiths 2000). Use of modern technology should address most predictable age-related declines in health.

Well-managed teams have been found to be of benefit in supporting the ongoing employment of older workers. Team leaders are responsible for analysing employment difficulties or constraints of workers (Streb and Gellert 2011). Where solutions are required, these should be sought in consultation

with the workers themselves. For chronic or long-term issues, occupational health assessment may be of benefit, where the reported difficulties are considered in the context of the individual's capability and job description. Any necessary changes to work roles can then be put into place. Such procedures are generally met with support both from workers and managers as both job satisfaction and productivity improve.

Some industries have incorporated the expected needs of an older workforce into the design of new production facilities, for example, Toyota Motor Corporation (Amasaka 2007). Management were faced with increasing global competition, as well as an ageing domestic workforce on assembly lines. It was recognised that a new system of manufacturing needed to be developed, which would ensure that worldwide production was possible without compromising on quality, which did not entirely depend on a young male workforce. Workers' opinions were sought to identify areas of subjective concern. Having analysed ergonomics, physiology and psychology, approaches to defined employee concerns, including motivation, fatigue, physical strength, tools and equipment, temperature conditions and disease prevention were considered. For example, to mitigate against declining muscular strength, which was compounded by uncomfortable working postures and heavy manual handling demands, assistive devices were developed. It was also recognised that consideration should be made for reduced endurance as not all workers may be able to maintain the same work pace of younger workers. Workers were encouraged to maintain their own physical strength and flexibility by engaging in exercise and stretching programmes. Additional breaks were introduced to help to prevent worker fatigue; consequently, fewer errors which required the assembly line to halt were noted, and consequently, productivity increased.

Occupational health interventions have been shown to reduce the rate of retirement in workers who themselves predict that they will retire earlier than planned due to subjective difficulties in work (De Boer et al. 2004). Such interventions can also reduce sickness absence among older workers and improve the overall quality of life of employees. Occupational health consultations focus on occupational health concerns, health conditions and social or psychological factors. The occupational health physician can liaise with the employees' own treating physicians as well as with human resource management. This facilitates health concerns being addressed as well as changes to work where required. Work changes include alterations to work tasks, additional work tools or supports, modified work hours and efforts to improve relationships in the workplace.

Conclusion

In conclusion, a co-ordinated multidisciplinary approach, with input from employees, managers, employers and physicians is required to support workers with medical problems potentially attributed to ageing remaining in the workforce. These resources should not be applied based on a threshold age or on other arbitrary definitions of being old, but rather on individual need, as with any employee. Where possible, a range of work options should be considered rather than relying on restrictive predefined processes which have the potential to limit choice and flexibility for both employees and employers. The benefits for the workers are immense, including a sense of purpose, better social support and improved self-esteem, which are particularly valuable at a time in life when one's lifestyle outside of the workplace may also be compromised by health concerns. Employment should be encouraged where possible until eventual retirement is pursued in a dignified and supported manner. Such an approach will promote the ongoing employment of older workers, and in turn, workplaces and society in general will profit from the ongoing engagement of older workers.

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Part II

Older Workers

8

Healthy Ageing and Well-Being at Work

Kristina Potočnik

Achieving healthy ageing and well-being at work has become an issue of growing importance, particularly with recent changes in retirement legislation in Europe and beyond. Some of these changes include the abolition of mandatory retirement age in the UK and increased retirement ages in other European Union (EU) countries—in most cases, from 65 to 67 years of age in countries such as Germany, France, Spain and Denmark (Peiró et al. 2012). Research to date has not yet provided unequivocal support regarding how ageing affects employee well-being. Whereas some studies have observed positive effects, others have reported negative age effects on employee well-being (e.g., Alkjaer et al. 2005; Sui et al. 2001). Regarding occupational well-being, in particular, most of the research has supported a U-shaped relationship between age and well-being in the workplace with younger and older employees showing the highest levels of occupational well-being (e.g., Zacher et al. 2014). The existing evidence therefore seems to suggest that age may not necessarily have an adverse impact on health and well-being at work, but much more research is needed to understand this relationship. This chapter addresses the issue of healthy ageing at work by first integrating the existing evidence around the age effects on psychological and subjective well-being among older employees and then analysing different underlying mechanisms and protective factors

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implicated in the age–well-being relationship in order to shed more light on how healthy ageing at work can be achieved.

Introduction

It has widely been acknowledged that the world population is ageing. According to the recent UN statistics, global life expectancy is predicted to increase from 69 years in 2005–2010 to 76 years in 2045–2050 (United Nations 2013). In more developed regions, such as EU countries, this increase is projected to jump from 76 years in 2005–2010 to 83 in 2045–2050. This ageing tendency in the developed regions can also be seen from the population distribution in different age groups. In 2013, 27.5 per cent of the population in developed regions was over 60 and this is projected to increase to up to 41.5 per cent by 2050. When exploring the employment rates in the EU, recent data shows an employment rate of 51.8 per cent in the 55–64 age category (Eurostat 2015). Due to these demographic projections, different changes to retirement legislation and practices around the world have been implemented, such as the abolition of the retirement age in the UK, and postponing the retirement age or introducing phased retirement in other EU countries (Peiró et al. 2012).

In light of these changes, there has been an increasing concern about how to achieve healthy ageing. On the one hand, one could argue that the policy-level benefits, such as the provision of improved pension schemes and the access to high-quality healthcare, could help achieve this goal. On the other hand, however, although having financial security and medical assistance is important for health and well-being in old age, there are many other personal and contextual factors that contribute to healthy ageing. Previous research, for instance, has found that having different resources to cope with everyday life, including social resources and maintaining an active lifestyle, is very important for psychological well-being and quality of life in older adults (e.g., Cho et al. 2015; Kahana et al. 2012; Potočnik and Sonnentag 2013).

The aim of this chapter is to review and integrate previous research that has explored age effects on psychological well-being in older employees and the underlying mechanisms of such effects. Drawing on different frameworks, such as activity theory (Havighurst 1963), conservation of resources (COR) theory (Hobfoll 2001) and selective optimisation with compensation (SOC) theory (Baltes and Baltes 1990) among others, the chapter then discusses different facilitating factors important for achieving successful ageing and sustained well-being in older employees. Particular attention is focused on different factors that may protect well-being in old age which should be included in intervention programmes aiming to achieve successful and healthy ageing.

Conceptualisation of Healthy Ageing

The concept of “healthy ageing” is one of many different terms in the literature that relate to “*ageing well*” (Foster and Walker 2015) and contradict the controversial assumptions of one of the early theories of ageing called the disengagement theory (Cumming and Henry 1961). Disengagement theory views ageing from a negative perspective, suggesting that our societies disengage from older employees through the process of retirement and older employees mutually withdraw from societies because they cannot engage in productive roles anymore (Potočnik and Kowalski 2015). This approach to ageing has been clearly rejected in the more contemporary literature highlighting an activity perspective whereby older adults are considered as an important “resource” with an active part to play in our societies.

Successful ageing, active ageing, positive ageing, productive ageing, proactive ageing, sustainable ageing and competent ageing are other terms that scholars and policymakers have used to refer to older adults as an active and productive part of our society. Although “*ageing well*” is difficult to operationalise, there is consensus in the literature that the criteria of successful or healthy ageing include subjective well-being, life satisfaction and longevity (Jopp and Smith 2006; Zacher 2015a).

Perhaps successful ageing and active ageing have been the most frequently used terms in both academic and policy and practitioner circles. The term active ageing has been predominantly used in Europe and highlights the active role older people have in our societies, regardless of their physical health or employment status (WHO 2002). Specifically, active ageing has been defined as “the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age.” (WHO 2002: 12). In contrast, the concept of successful ageing has long been established in the ageing discourse and gerontology literatures in the USA (Butler 1974; Rowe and Kahn 1987 1997) which define this concept in terms of low probability of disease and disease-related disability, high cognitive and physical functional capacity and active engagement with life. More recently, Zacher (2015a) has operationalised successful ageing at work in terms of positive deviation from the average trajectory in a favourable outcome, such as well-being, across the working life span. In other words, this definition suggests that employees are ageing successfully if they are, for instance, healthier or if their decline in work ability is lower, compared to their counterparts. Kooij (2015a) has also provided a recent conceptualisation of successful ageing using a sustainability perspective and paying particular attention to the proactive role of employees in achieving successful ageing. According to Kooij (2015a, b), successful ageing is achieved if employees manage to maintain their health,

motivation and work ability now and in the future. In order to age successfully, employees have to strive for the continuous person–job fit which can be achieved by engaging in different proactive behaviours. Although Zacher (2015b) has challenged this sustainability perspective of successful ageing, questioning particularly the “maintenance” as an indicator of successful ageing, Kooij (2015b) has further convincingly argued about the usefulness of this approach. She has suggested that considering the resource-based dimension of sustainability, successful ageing can be better understood by focusing on preservation and regeneration of resources which are instrumental in achieving work-related goals and consequently, successful ageing. She further clarified that the maintenance of health, motivation and work ability could be considered as a minimum requirement to evaluate whether an employee has aged successfully because it refers to maintaining the current levels of functioning despite experiencing new challenges in the way (Kooij 2015b).

Although there are differences between active, successful and healthy ageing (see Foster and Walker (2015) for a more detailed conceptual analysis), for the sake of simplicity in this chapter, I use them interchangeably to refer to older employees as valuable assets in organisations who possess important competences and knowledge to advance organisational goals and therefore should be considered as active participants in the organisations and wider society. Following Zacher (2015a), I will focus on three central elements of healthy and successful ageing to address well-being in older employees: (1) outcomes of healthy ageing (i.e., criteria for successful ageing), including a combination of objective and subjective criteria, such as physical health and absence of illness on one hand and subjective and psychological well-being on the other hand; (2) explanatory mechanisms underlying the age–well-being relationship, such as age-related changes in personal and contextual factors; and (3) boundary conditions (i.e., facilitating and constraining factors) that influence well-being in older employees, including personal resources and engaging in successful coping strategies. The overarching aim of this analysis is to shed more light on how organisations and wider communities could optimise the opportunities for active participation of older employees in our societies and help them achieve and maintain psychological and subjective well-being in their workplaces.

Outcomes of Healthy Ageing in the Workplace

Undoubtedly, one indicator of successful ageing is sustaining health and well-being in older adults and, in addressing this matter, we should first understand how age affects subjective and psychological well-being and physical

health. A review of the literature in this area reveals vast research into the relationships between age and occupational well-being, looking at indicators such as job satisfaction, emotional exhaustion, depersonalisation, vigour at work and occupational stress, among others (Ng and Feldman 2010). Although some studies reported detrimental effects of age on occupational well-being, such as occupational strain (Kirckaldy and Martin 2000) and cognitive irritation (Rauschenbach et al. 2013), most of the past research has provided support for the U-shaped relationship whereby employees in the 20–40 age group experience lower levels of occupational well-being compared to their younger and older counterparts (Birdi et al. 1995; Clark et al. 1996; Warr 1992; Zacher et al. 2014). A recent meta-analysis has found positive effects of age on a wide array of occupational well-being indicators, although the effect sizes ranged from weak to moderately strong (Ng and Feldman 2010).

Going beyond the occupational well-being indicators, some studies have explored the age effects on older employees' subjective and psychological well-being, such as mental health, depression, anxiety and quality of life (e.g., Ng and Feldman 2013). Compared to the research on occupational well-being, findings regarding the age effects on employee psychological and subjective well-being have been less consistent. On one hand, some studies have suggested a positive relationship with age and mental health (e.g., Ng and Feldman 2013; Sui et al. 2001). Similarly as in the case of job satisfaction, Clark et al. (1996) observed a U-shaped relationship between age and mental health, suggesting also that when it comes to general mental health, younger and older employees are the healthiest.

On the other hand, Nuñez (2010) has shown positive age effects on depression and mental illness although these effects became less detrimental among older workers, which is again in line with the research that reported a U-shaped relationship between age and health (e.g., Clark et al. 1996; Zacher et al. 2014). In terms of physical health indicators, this study also reports positive age effects on health problems, in particular in relation to arms and hands, back and neck, chest and breathing, heart and blood, the digestive system and diabetes (Nuñez 2010). In a recent meta-analysis, Ng and Feldman (2013) also found support for the positive effects of age on physical health indicators, such as blood pressure, cholesterol levels and body mass index. These authors also observed positive but weak effects of age on insomnia and muscle pain. In terms of health-related behaviour, they only found weak effects of age on smoking: older employees were more likely to smoke compared to their younger counterparts.

This previous research is summarised in Table 8.1. Based on previous findings, we might conclude there is little evidence to suggest that older employees

Table 8.1 Summary of age effects on different health indicators

	Health indicator	Example studies
Beneficial effects of ageing	Occupational well-being	Birdi et al. (1995), Ng and Feldman (2010)
	Mental health	Clark et al. (1996), Ng and Feldman (2013)
	Job satisfaction	Clark et al. (1996), Zacher et al. (2014)
	Emotional exhaustion	Zacher et al. (2014)
Detimental effects of ageing	Occupational strain	Kirckaldy and Martin (2000)
	Cognitive irritation	Rauschenbach et al. (2013)
	Physical health	Ng and Feldman (2013), Nuñez (2010)
	Insomnia	Ng and Feldman (2013)

suffer from impaired subjective and psychological well-being in general and at work in particular. In fact, existing studies rather suggest that older employees enjoy higher psychological well-being compared to their middle-aged peers. In terms of more objective health indicators, however, research seems to suggest that older employees exhibit poorer physical health compared to their younger counterparts, although the effects are rather weak. Hence, overall, we might conclude that older employees do not suffer from impaired health and well-being and that more serious decline in health in old age seems to occur at much later stages in life, after older adults have already withdrawn from active workforce participation (Asakawa et al. 2012; Ng and Feldman 2013; Wrosch et al. 2007). These findings further reject the assumptions of the disengagement theory of ageing (Cumming and Henry 1961) and suggest that older adults should be supported in extending their working lives. Different explanatory mechanisms are discussed next in order to shed more light on what could potentially account for these effects on the health and well-being of older workers.

Explanatory Mechanisms of Age Effects on Health and Well-Being

Literature on ageing in the workplace has discussed different processes that might explain the age effects on employee well-being. In terms of occupational well-being, the so-called job change hypothesis has been suggested to explain why older employees tend to experience higher job satisfaction (Ng and Feldman 2010; Rauschenbach et al. 2013; Wright and Hamilton 1978). This hypothesis suggests that as employees age, they tend to get better

jobs because they have more experience and improved skills. Therefore, they are better equipped to cope with job demands, which consequently leads to improved occupational well-being in older employees (Siu et al. 2001). Related to the job change hypothesis, it has also been suggested that older employees have higher salaries and that their jobs are more congruent with the type of jobs they want in life, which positively impacts their job satisfaction (White and Spector 1987).

Some scholars have also suggested that positive age effects on occupational health and well-being might be due to greater internal locus of control in older employees and improved coping strategies (Aldwin et al. 1996; Lachman and Weaver 1998). The latter is in agreement with the life span theory of control (Heckhausen et al. 2010) which suggests that the use of primary control coping strategies (i.e., active, problem-focused strategies that change the environment to bring it into a line with one's preferences) increases with age, reaching its peak in the 45–64 age group. In other words, previous research and the life span theory of control suggest that as employees age, they tend to use a more proactive coping approach whereby they appraise work-related demands as less stressful. In turn, this might lead to lower levels of work-related strain and ill-health in older employees compared to their younger colleagues. Research has also suggested that older employees may exert more primary control in their workplaces because they have more job control compared to their younger peers. This argument is based on the assumption that older employees are more likely to have higher positions in their organisations and greater experience which gives them more job control (Kanfer and Ackerman 2004; Rauschenbach et al. 2013). Therefore, higher job control may not only be a useful resource (or facilitating factor) for older employees to cope with occupational stress as suggested by the job-demands-control model (Karasek 1979) but it also helps them enhance and apply primary coping strategies, all of which can help explain the positive age effects on health and well-being. Furthermore, in addition to greater experience and more proactive coping, the shift from extrinsic to intrinsic motives as people age (e.g., putting less value on pay and promotion opportunities and more on maintaining positive relationships at work) has been suggested as explanatory mechanisms as to why older employees might appraise certain demands or threats as less stressful, relative to their younger counterparts, ultimately leading to the experience of better psychological well-being (Clark et al. 1996; Kooij et al. 2011; Rauschenbach et al. 2013).

In relation to the motivational mechanisms underlying healthy ageing, some of the most recent work has been driven by another life span theory, specific to motivation, called socio-emotional selectivity (SST) theory (Carstensen 1995,

2006). This framework suggests that the subjective perception of how much time individuals have left to live (i.e., future time perspective) more strongly predicts a range of cognitive, emotional and motivational outcomes than an individuals' chronological age alone. According to the SST, people who perceive their future time to be limited put more emphasis on emotionally meaningful social goals to optimise their well-being. In contrast, those who perceive their future time to be open-ended are more likely to prioritise instrumental social goals such as learning new skills and expanding knowledge (Carstensen 2006; Kooij et al. 2013a). Given that individual chronological age is correlated with the time remaining to live, as people age, the more limited time perspective they perceive, and therefore, they prioritise more emotionally meaningful goals to enhance their well-being. This theory predicts that as long as individuals experience a congruence between the perception of their future time perspective and the type of goals they prioritise, they should experience enhanced subjective well-being. A recent study by Kooij et al. (2013a) has empirically explored these assumptions. Specifically, this study suggests that future time perspective and perceived subjective health may explain the age-related changes in four different types of employee motives: (1) growth (i.e., preference for job characteristics related with achievement and mastery such as challenging work; expected to decrease with age), (2) esteem (i.e., preference for job characteristics related with perception of recognition and status; also expected to decrease with age), (3) security (i.e., preference for job aspects that protect employees against the loss of material and physiological needs, such as pay and job security; expected to increase with age) and (4) generativity (i.e., preference for job aspects related with sharing skills with younger peers; also expected to increase with age). In turn, these four motives were suggested to predict occupational well-being operationalised in terms of work engagement. They found that growth and esteem motivations decreased with age because of the age-related decrease in open-ended future time perspective, whereas poor subjective general health explained the positive relationship between age and security motives and negative relationship between age and growth motives. Growth, esteem and generativity motives, in turn, positively predicted work engagement (Kooij et al. 2013a). This study provides support for the SST in that we should focus more on subjective perceptions of employee ageing, such as future time perspective and subjective health perception rather than chronological age to manage older employee health and well-being successfully.

When it comes to negative age effects on health and well-being, the literature has suggested that age-related decline in some cognitive abilities, such as working memory, might explain these effects (Potočnik and Kowalski 2015; Rauschenbach et al. 2013; Salthouse 2012). Due to this decline, older

employees might perceive they are not capable of coping with certain job demands effectively, which could lead to increased experience of strain and poorer well-being. It is important to note, however, that according to the “mental exercise” or “use-it-or-lose-it” hypothesis (Finkel et al. 2009; Salthouse 2006), age-related cognitive decline can be ameliorated by encouraging older employees to engage in intellectually stimulating activities. This is discussed further in the next section on boundary conditions of healthy ageing at work.

Table 8.2 shows a summary of the above-reviewed processes that may account for the age effects on health and well-being at work. There seems to be consensus in the literature that older employees experience and occupational tenure help them refine their knowledge and skills and also other personal resources such as (internal) locus of control and use of coping strategies (Ackerman 1996). It is these age-related gains that have been suggested to lead to enhanced and sustained health and well-being in older employees. These different resources and other facilitating and constraining factors that might influence older employees’ well-being are discussed next in order to provide an analysis of different boundary conditions needed to achieve healthy ageing at work.

Table 8.2 Summary of theories and their explanatory mechanisms of age effects on health and well-being

Theory	Explanatory mechanisms	Example studies
Job change hypothesis (Wright and Hamilton 1978)	Older employees have greater experience, improved skills, higher income and higher job control that comes with higher occupational status	Rauschenbach et al. (2013), Siu et al. (2001)
Life span theory of control (Heckhausen et al. 2010)	The use of more internal locus of control and increased use of proactive, problem-focused coping strategies as people age	Aldwin et al. (1996), Lachman and Weaver (1998)
Socio-emotional selectivity theory (Carstensen 1995)	Individuals perceive they have less time to live as they age (i.e., they have more limited future time perspective) and they start prioritising different goals relative to their younger peers. Employee health is enhanced if there is congruence between the individual perception of the future time perspective and the type of prioritised goal	Kooij et al. (2013a), Zaniboni et al. (2013)
Mental exercise/ “Use-it-or-lose-it” hypothesis (Salthouse 2006)	Age-related decline in cognitive abilities such as working memory may lead to impaired health and well-being. This decline, however, can be ameliorated by engaging in intellectually stimulating activities	Finkel et al. (2009), Salthouse (2006)

Facilitating and Constraining Factors of Achieving Healthy Ageing at Work

There is a considerable amount of gerontology, life span and occupational psychology research that has explored different factors implicated in achieving successful and healthy ageing (Zacher 2015a). Most of this research has been driven by the lifespan model of selective optimisation with compensation (Baltes and Baltes 1990), activity theory (Havighurst 1963), COR theory (Hobfoll 2001) and continuity theory (Atchley 1989). Towards the end of this section, research exploring the role of different working conditions drawing on different theoretical frameworks is also discussed.

Selective Optimisation with Compensation Model

The SOC model is one of the leading theoretical frameworks that aims to explain what strategies individuals are likely to use in order to cope with age-related losses and gains over their lifespan (Zacher 2015a). This model suggests that, at any point in time, people's resources are limited and hence people have to select life domains that are of importance to them and allocate these limited resources to these chosen domains in order to increase the likelihood of their success (Baltes and Rudolph 2012). Specifically, the theory suggests that people may use three behavioural strategies to cope with age-related opportunities or losses: (1) selection, (2) optimisation and (3) compensation strategies (the SOC strategies hereinafter). Selection strategy refers to setting and prioritising goals either in terms of personal preferences or due to perceived loss of resources, optimisation strategy is about obtaining and improving the means to achieve the set goals and the compensation strategy refers to obtaining alternative means to maintain a desired level of functioning in order to fulfil the selected goals. There is evidence to suggest that adults from the 43–67 age group are more likely to use SOC strategies compared to their younger and older counterparts (Freund and Baltes 2002). Research on healthy ageing, based on the SOC model, further suggests that since aging itself is involved with a loss of various resources, older employees who use SOC strategies may more successfully cope with such loss and subsequently may sustain their well-being for longer (Baltes 1997; Zacher 2015a). Therefore, in order to achieve healthy ageing, older employees are recommended to engage in SOC strategies when dealing with their work demands in order to protect their health and well-being.

Activity Theory

Activity theory is another theoretical framework that has been used to study successful ageing, particularly looking at the criteria of health and well-being (Havighurst 1963). According to this approach, fulfilling social and psychological needs, such as engaging in different activities, is continuous across the lifespan and older adults should maintain the active lifestyle in order to achieve healthy ageing (Potočnik and Sonnentag 2013). In fact, previous research has confirmed the importance of active lifestyle for reduced mortality and decreased cognitive impairment risks (Glass et al. 1999; Wang et al. 2002), greater life satisfaction and positive affect (Nimrod 2007), lower stress and depression levels (Herzog et al. 1998; Patterson 1996; Potočnik and Sonnentag 2013) and enhanced quality of life (Potočnik and Sonnentag 2013). These studies have looked at a wide range of different productive and non-productive activities to operationalise the active lifestyle of older and middle-aged adults, such as volunteering, providing help to relatives and neighbours, participating in community organisations, attending social clubs, taking up educational courses and engaging in physical exercise, among others (Potočnik and Sonnentag 2013).

On the whole, research based on activity theory suggests that maintaining an active lifestyle helps older adults achieve healthy ageing because engaging in activities implies they are achieving valued personal goals which enhances their positive self-concept, self-esteem and sense of competence (Warr et al. 2004a). Engaging in activities also fulfils the needs for affiliation (i.e., opportunities to socialise), time structure and generativity, all of which should contribute positively to individual well-being (Griffin and Hesketh 2008; McAuley et al. 2000; Poon and Fung 2008). Furthermore, as mentioned before, individuals who engage in different activities might be more mentally active which was argued to slow down their age-related cognitive decline, and consequently, foster their healthy ageing. Engaging in physical exercise was also shown to improve a variety of physical health indicators, such as cardiovascular health and strength and reduce chronic disease risk factors (Jenkins et al. 2002). Therefore, based on the evidence that largely supports activity theory, we could conclude that as long as older employees engage in different activities (particularly going to sports and social clubs—see Potočnik and Sonnentag 2013), they should maintain their well-being and achieve healthy ageing.

Conservation of Resources Theory

Another theoretical approach that has been used to explain what factors may protect health and well-being in older employees is the COR theory (Hobfoll

2001). In essence, this model suggests that “individuals strive to obtain, retain, protect, and foster those things that they value” (Hobfoll 2001: 341). These “valued things” are called resources and can be further classified into two categories: (1) resources “that are valued in their own right” (Hobfoll 2001: 339) and (2) resources that are valued because they are instrumental in achieving and/or protecting the resources in the first category. According to this theory, people are likely to experience stress and impaired well-being when their valued resources are either lost or threatened with loss. When applied to the context of healthy ageing, the COR theory would predict that older employees must have their valued resources at their disposal in order to protect their health and well-being and to minimise the experience of occupational stress (Potočnik and Sonnentag 2013).

For instance, constructs such as positive self-concept, self-esteem and self-efficacy which can be obtained from engaging in different activities, as discussed above, could be considered as valued motivational resources in accordance with the COR theory which might help protect subjective and psychological well-being. Other resources we could suggest as important for protecting older employees’ well-being are financial (e.g., savings and income), cognitive (e.g., working memory) and social (e.g., having a good network) (Hobfoll 2001; Wang and Shi 2014). Some of these resources, such as motivational resources, may directly affect older employee well-being, whereas others might be important to gain and protect other valued resources—for instance, financial resources may be considered as important in order to gain and maintain social resources. Importantly, based on this approach, the loss or a mere threat of a loss of any of these resources that older employees value may lead to impaired health and well-being. Therefore, based on this approach, healthy ageing can be achieved by facilitating older employees to gain and also maintain the resources they value over time.

Continuity Theory

Continuity theory (Atchley 1989) suggests that older employees need to maintain their daily routines and time structure once they retire in order to experience as little stressful and unexpected disruptions as possible to achieve healthy and successful ageing. Bridge employment, defined as the type of employment that occurs after the individual has retired from a full-time job but before he/she permanently withdraws from the workforce (Feldman 1994; Kim and Feldman 2000), could help achieve these goals, consequently leading to better adjustment of older employees after they retire from their full-time

jobs (Dingemans and Henkens 2014; Müller et al. 2013). Empirical evidence has largely supported this suggestion, showing that older adults who engage in bridge employment experience greater life satisfaction (Kim and Feldman 2000; Topa et al. 2014), job satisfaction (Topa et al. 2014), psychological well-being (Wang 2007), mental health (Zhan et al. 2009) and quality of life (Topa et al. 2014) and also fewer major diseases and declines of daily functions (Zhan et al. 2009). More recently, Dingemans and Henkens (2014) found that bridge employment was related to greater life satisfaction only if older employees sought the bridge employment for intrinsic rather than extrinsic motives. These authors also report that bridge employment mitigated the adverse effects on life satisfaction that involuntary retirement from a full-time job can bring. This is a very significant finding given that past research has consistently documented the detrimental effect of involuntary retirement on psychological well-being (Potočnik et al. 2010; Wang and Shultz 2010; Warr et al. 2004b). Based on this evidence, we could consider bridge employment as an important protective factor of health and well-being in older individuals.

Other Research

Finally, we should also examine a set of studies that explored facilitating factors of healthy ageing which draw on a range of different frameworks. For example, based on *social identity theory* (Tajfel and Turner 1979), Cheung and Wu (2014) found that individuals who affectively identified themselves with older workers (e.g., “I am glad to be an older worker”) experienced better adaptability and health. However, those who cognitively identified themselves with older workers (e.g., “I see myself as an older worker”) experienced better adaptability and health only if they had a positive attitude towards ageing.

Mauno et al. (2013) explored the relationships between different job stressors and well-being indicators among younger and older employees, drawing on *psychological contract theory* (Rousseau 1989) and SST (Carstensen 1995). On the one hand, they found that work–family conflict was less harmful for life satisfaction and that workload had a weaker negative impact on job satisfaction among older employees relative to their younger counterparts. On the other hand, however, they found that job insecurity had a stronger negative impact on older employees’ job satisfaction, vigour and work–family enrichment compared to younger employees. This study shows that older employees are not necessarily more resilient to job stressors and that in certain situations, such as the case of job insecurity, they could be more adversely affected than their younger counterparts.

In a recent study following *the life span theory of control* (Heckhausen et al. 2010), Besen et al. (2015) found that in older employees with higher levels of personal control, job demands had less adverse impact on mental health. In the subgroup of younger employees, higher job control buffered the negative relationship between job demands and mental health, but only for those younger employees who had high personal control.

There are also a couple of studies that looked at different organisational, HR and workplace-related factors as boundary conditions of age–health relationships. For instance, Taylor et al. (2013) explored age, gender and socio-economic differences in the relationships between different work characteristics and job satisfaction and psychological well-being at work, respectively. Their results showed that everyday discrimination at work had a stronger negative relationship with job satisfaction in older males compared to their younger male colleagues. Kooij et al. (2013b) examined the role of “development” and “maintenance” HR practices in the relationships between age and well-being operationalised in terms of commitment, satisfaction and organisational fairness. Confirming their expectations, they found that “development” HR practices (e.g., training opportunities) had detrimental effects on well-being, whereas “maintenance” HR practices (e.g., performance appraisal) had positive effects on well-being among older workers.

A summary of research that explored different facilitating and constraining factors of healthy ageing is shown in Table 8.3. Based on this summary, we could conclude that it is important for older employees to have a good stock of resources they value, to continue engaging in intellectually stimulating activities and activities that help them maintain their social networks and physical fitness, to exercise their personal control at work in order to cope with their demands and to develop positive attitudes towards ageing. Organisations could also help older employees protect their health and well-being by designing non-discriminatory working environments and providing older employees with higher job security (e.g., their jobs are safe at least as far as their chronological age is concerned). Although the research in this field is thriving, much more has to be done in order to understand how healthy ageing can be achieved.

Future Research Agenda

As we have seen so far, research on healthy ageing to date has been driven by diverse theoretical frameworks trying to shed light on both underlying mechanisms that could explain age effects on health and well-being as well as

Table 8.3 Summary of theories and their proposed facilitating and constraining factors of achieving healthy ageing at work

Theory	Facilitating/constraining factors of healthy ageing	Example studies
Selective optimisation with compensation—SOC theory (Baltes and Baltes 1990)	The use of (1) selection (setting and prioritising goals), (2) optimisation (obtaining and improving the means of achieving the set goals) and (3) compensation (obtaining alternative means to maintain a desired level of functioning to fulfil the set goals) strategies	Baltes (1997), Freund and Baltes (2002)
Activity theory (Havighurst 1963)	Engagement in different productive and social activities such as volunteering, providing help to relatives and neighbours, participating in community organisations, attending social clubs, taking up educational courses and engaging in physical exercise	Potočnik and Sonnentag (2013), Warr et al. (2004a)
Conservation of resources—COR theory (Hobfoll 2001)	Having a good stock of different resources, including motivational (e.g., self-efficacy), social (e.g., having a large social network), financial (e.g., salary, property) and cognitive resources (e.g., working memory)	Wang and Shi (2014)
Continuity theory (Atchley 1989)	Engaging in bridge employment (i.e., having some sort of a part-time job, as opposed to immediate full-time retirement) before retiring fully from the active workforce	Dingemans and Henkens (2014), Müller et al. (2013)
Other research following diverse theories	<p>1. <i>Social identity theory</i>: affective identification with older workers; cognitive identification with older workers and having positive attitude towards ageing</p> <p>2. <i>Psychological contract theory</i>: job insecurity a constraining factor</p> <p>3. <i>Life-span theory of control</i>: personal control</p> <p>4. <i>Other research</i>: discrimination in the workplace a strong constraining factor; development HR practices a constraining factor but maintenance HR practices a facilitating factor of healthy ageing</p>	<p>Besen et al. (2015), Cheung and Wu (2014), Kooij et al. (2013b), Mauno et al. (2013)</p>

identifying different protective and constraining factors of well-being in older employees. More research is needed, however, to provide a clearer and more comprehensive picture of how different individual and work-related variables affect health in older employees and their ability to engage in a process of healthy ageing.

First, most of the studies that explored the mechanisms underlying the age-health relationship suggest that as people age, they experience changes in personal and contextual aspects of their lives and it is these age-related changes that affect their health and well-being (e.g., improved coping strategies and increased job control as people age). It has to be noted, however, that research to date has largely failed to directly explore these assumptions. In order to test the underlying or mediating effects of such age-related changes on health and well-being, studies should employ longitudinal designs in which explanatory variables and health and well-being outcomes are measured at multiple points in time. Such research designs would allow a researcher to account for any age-related changes directly and could lend more conclusive support in relation to the ways in which age affects health and well-being.

Second, such longitudinal analysis of age-related changes and their impact on health and well-being would fit the life course approach to health which “emphasises a temporal and social perspective, looking back across an individual’s or a cohort’s life experiences or across generations for clues to current patterns of health and disease, whilst recognising that both past and present experiences are shaped by the wider social, economic and cultural context” (WHO 2000: 4). Although there is research in developmental psychology and epidemiology that has adopted this life span approach to study individual health, scholars in the occupational psychology and management studies should also start adopting this framework on a larger scale to more rigorously study how occupational and work-related aspects affect individual health over time, particularly taking into consideration the policy initiatives of postponing retirement ages and extending working lives. The life course approach to healthy ageing at work would not only help identify and confirm the key criteria for healthy ageing but also allow us to address potential intergenerational differences in achieving healthy ageing. It could also tease out the role of experience from chronological age in explaining the underlying mechanisms of healthy ageing. Most of the research has suggested that positive age effects on health and well-being are due to older employees having more experience, but chronological age and experience may not always be related. For instance, some individuals may have undergone a significant career change later in life and therefore may not necessarily have more experience to cope with their demands compared to their younger colleagues who have been in that particular line of work for longer. A life course approach could help clarify this and other similar issues related with achieving healthy ageing over time.

Third, in terms of exploring the facilitating and constraining factors of healthy ageing, future research should focus on simultaneously exploring both individual and contextual factors in order to get a much clearer picture

of boundary conditions under which health and well-being of older employees can be enhanced. For instance, drawing on SOC theory, future research could explore whether the effectiveness of SOC strategies in achieving healthy ageing is contingent on any work-related characteristics, such as occupational complexity or type of work. It could be that the SOC strategies are particularly useful for fostering health and well-being in older employees who deal with a specific type of work demands (e.g., more complex and mentally challenging) compared to other types of demands (e.g., less complex, more routine). There is also a lack of empirical research in exploring different sets of resources simultaneously. For instance, following the COR theory, we could expect that social resources protect older employees' health and well-being but particularly so if they can also rely on having sustainable financial resources. Future research should empirically address such assumptions. Importantly, given that past research to date has found that age has differing effects on different health and well-being indicators, future research should consider various health and well-being indicators simultaneously. This is important to gain more conclusive evidence about what indicators are positively affected by age and which are negatively affected by age.

Finally, future research should develop theory-driven intervention studies to help older employees learn the strategies that could help them achieve healthy ageing. For instance, following the SOC framework, future research could develop programmes that aim to train older employees in how to use SOC strategies in order to promote positive outcomes in their lives, such as health and well-being (Baltes and Rudolph 2012). Future research could also design intervention studies that target the development of different resources which, according to the COR theory, are protective of health and well-being in older employees. Such intervention studies would potentially have a significant impact on healthy ageing, particularly if they employed experimental or quasi-experimental designs with a control group in order to yield meaningful findings.

Conclusion and Implications

Although research on healthy ageing is vast, empirical evidence on how age affects health and well-being is still not conclusive enough. On the whole, previous studies suggest that age does not adversely affect employee occupational, subjective and psychological well-being. Negative effects have been mainly observed in relation to physical health symptoms. Different age-related changes in individual lives, motive structure and coping strategies have

been suggested to account for these age effects. Based on the research that has explored different protective and constraining factors of healthy ageing, a set of different practical implications can be drawn at the individual, organisational and policy levels.

At the individual level, we could suggest older employees should accumulate valued resources to achieve healthy ageing. They could achieve that by continuing to or commencing engaging in social activities, such as going to social clubs. The negative effects of age on physical health can be ameliorated by engaging in physical exercise. Older employees could also be encouraged to use the SOC strategies in order to cope with their demands at work more effectively which, in turn, might protect their health and well-being. At the organisational level, it seems important that organisations provide older employees with a sense of job security and a future time perspective. In other words, organisations have to communicate to older employees that they are offering them many different opportunities in the future and that they can continue working in their companies, if they wish to do so, in order to enhance their perceptions of an open-ended future time perspective and job security. At the policy level, retirement legislation could be adjusted to endorse the possibility of older employees engaging in bridge employment once they retire from their full-time careers. Although more research is needed to draw more conclusive implications, a combination of these recommendations seems a promising start towards achieving healthy ageing in general and at work in particular.

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9

Innovative Pathways to Meaningful Work: Older Adults as Volunteers and Self-Employed Entrepreneurs

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Introduction

A recent report issued by the United Nations stated, “The global share of older people (aged 60 years or over) increased from 9.2 per cent in 1990 to 11.7 per cent in 2013 and will continue to grow as a proportion of the world population, reaching 21.1 per cent by 2050” (Department of Economic and Social Affairs 2013, p. xii). We refer to these trends as “disruptive demographics” because the population shifts are not only dramatic, but they also have the potential to ignite conversations about some of the positive contemporary experiences associated with the aging of the population. Furthermore, disruptions caused by the aging of the workforce may well foster the discovery of new opportunities for innovative and productive roles, that is, new forms of paid work and/or volunteering that can be assumed by older adults during the period of time that has conventionally been considered to be the “retirement years.”

As increasing numbers of older adults experience more, healthier years of life than did previous generations, experts have observed an unfolding of a new life course stage during later adulthood Laslett (1991). Scholars have

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articulated transformative paradigms about the experience of aging, including “successful aging” Rowe and Kahn (1997), “positive aging” Hill (2005), and “healthy aging” Butler and Gleason (1985). In this context, it is important to address compelling questions, such as: What do older adults want to do in this stage of life? How can older adults remain actively engaged as contributing members of society?

In this chapter, we focus on volunteerism and entrepreneurship/self-employment, two types of productive activities that can both be personally meaningful to older adults and also have the potential to contribute in some way to the society at large. We present some preliminary findings of our analyses of two datasets: the volunteering supplement of the current population survey (CPS), a nationally representative survey of United States households and the Health and Retirement Study (HRS), a nationally representative survey of US households with at least one person aged 50 or older. We find that being a volunteer is positively associated with indicators of well-being for older adults. Despite the job-related demands that can accompany self-employment, we find that self-employed older adults are not at increased risk with regard to their well-being. In our conclusion, we discuss the important implications that these behavioral shifts toward productive aging have for the life experiences of older adults as well as for practice, policy, and research.

Perspectives of Productive Aging

The Encore Stage of Life: A Time for Purpose and Meaning

The field of gerontology has focused significant attention on the declines and vulnerabilities that occur toward the end of life (e.g., see Singh and Misra 2009; Engelhardt and Gruber 2004; Frontera et al. 2000). However, in recent years, many of the traditional perspectives of aging have evolved to also discuss some of the positive experiences that older adults can encounter. Academics are once again embracing the insights provided by pioneering developmental psychologists, including Erikson (1963) and Levinson et al. (1978), who recognized that human development continues throughout the life course into later older adult years. As noted by Hinterlong et al. (2001), the “myth of *unproductivity*” during the older adult years is being actively challenged (p. 6). It is not uncommon for contemporary investigations of aging to reflect new perspectives about growth, contributions, and creativity observed during later life (see Bass and Caro 2001).

A number of terms have been coined to describe this new life stage, such as the “crown of life” James and Wink (2007) and the “stage of active wisdom” Bateson (2010). While there is general consensus that this new life stage occurs after midlife and before cognitive and physical declines affect daily life activities, no specific age parameters have been universally adopted. Recognizing that there is a significant amount of individual variability in the time of onset and duration of this new life stage, James and Wink (2007) suggest that it typically occurs between the age of 65 and 79.

Marc Freedman (2008) popularized the term “the encore stage of life,” referring to those years when older adults who have good health seek a “second act” and may express a desire to “give back” to their communities. Freedman noted that during the encore stage, older adults may want to experiment with roles that were either unassumed during younger adult years or that had been explored only at the margins. Some individuals may pursue pathways of passion and interest that can take them beyond the transactional employer–employee contract, either toward volunteering or “working for oneself.”

Principles of strengths-based perspectives provide a foundational underpinning to the construct of the encore stage of life. These principles challenge taken-for-granted assumptions associated with traditional career development theories. While career theories are usually used to explain and predict experiences with paid work, they also have some relevance to unpaid work. Starting with the work of Super (Super 1957; Super et al. 1996), career theory has often conceptualized careers as moving through different stages in a more or less predictable sequence: preparation, entry, early career, midcareer, late career, and labor force withdrawal (marking the end of one’s career with either partial or full retirement). In general, career theories have posited that career satisfaction is related to individuals’ access to stage-appropriate supports (such as training and development) and challenges (such as new assignments and responsibilities). However, career paths are often less predictable and linear than they may have been in decades past Mirvis and Hall (1994), and it is becoming normative for people to change not only jobs but also careers at all phases of their life course, including during the so-called “retirement years.”¹ Consequently, although older adults who change careers and experiment with new roles in their encore stage of life bring with them their cumulative knowledge and work experience, they might report that they are in “early career” or “mid-career”

¹Analyses of the National Longitudinal Study of Youth conducted in the United States, “The average person born in the latter years of the baby boom (1957–1964) held 11.7 jobs from age 18 to age 48...” (Bureau of Labor Statistics, 2015). Given the subjective nature of the assessment of what constitutes a career change, there is no comparable representative data about career changes among Baby Boomers in the United States.

with regard to the development of specific skills and competency sets (Pitt-Catsouphes et al. 2012). Against this backdrop of twenty-first-century careers, practitioners as well as scholars are starting to pilot test innovative career development practices for older adults—practices that can expand options for meaningful volunteering and self-employment experiences.

The Pursuit of Meaning, Purpose, and Fulfillment

The term “productive aging” refers to older adults’ participation in paid as well as unpaid activities that results in products and services which have some value to others (whether or not the products and services “go to market”). Perspectives about productive aging suggest that many older adults have motivation and enthusiasm for remaining involved in activities and roles that can result in a sense of self-actualization Hinterlong et al. (2001).

Definitions of “the meaning of work” and “work that is meaningful” are a bit conflated in the academic literature Pratt and Ashforth (2003). However, references to the meaning of work tend to focus on the economic, social, and psychological reasons why people engage in work. Birren (2001) has observed that when contemplating possible involvement in productive activities, older adults typically consider whether they might reap benefits with regard to physical and mental health, social relationships, cognitive and creative capacities, and a sense of independence. Similarly, Mor-Barak (1995) suggests that older adults might seek productive activities for personal benefits, social connections, the sense of satisfaction associated with generative actions, and (for paid work) financial benefits. While monetary benefits might be key drivers for involvement in paid employment AARP (2014), nonmonetary factors (such as continued intellectual challenge or opportunities to engage in generative activities that benefit others) could encourage some older adults to pursue either paid or unpaid work. As noted by Wrzesniewski (2003), these reasons for working help to explain the relationship that individuals establish (or want to establish) with their work (whether it is paid or unpaid).

Oftentimes, the meaning of work is connected to individuals’ sense of self and perceptions of identity (Bal and Kooij 2011; Ashforth 2001; Stryker and Burke 2000; Losocco 1989). Indeed, Baby Boomers in the USA report that work (both paid and unpaid) is connected to identity Chalofsky (2003). A recent study conducted by AARP found that more than four of every five of the survey respondents aged 45–74 in the USA reported that work is “... an important part of who they are.” (AARP 2014: 7).

In contrast to “the meaning or purposes of work,” the construct of “work with meaning or meaningful work” tends to focus on the opportunities fostered by paid and unpaid work that enables older adults to make a contribution to social issues, their communities, and the wider world (Wrzesniewski 2003: 301). Since meaningful work can help some to connect to their understanding of life’s purpose; consequently, meaningful work is sometimes characterized as “a calling” Wrzesniewski et al. (1997). There are some theoretical explanations for the tendency of some older adults to seek meaningful work. Generativity theory, first articulated by the developmental psychologist Erik Erikson (1963), proposes that individuals focus less on their own needs and more on giving back to society and on leaving a legacy as they age Einolf (2014). Socioemotional selectivity theory extends this observation and proposes that as we become older and accumulate life experiences, we begin to spend relatively more time and energy on emotionally fulfilling interactions because we become more sensitive to the decreasing amount of time we have before death (“perceived future time”) Carstensen (1995). Lang and Carstensen (2002) report that individuals are more likely to want to “leave a mark” on the world when their future time is perceived as limited (p. 129).

Despite the challenges associated with the measurement of the meaningfulness of work, there are some indications that perceptions of meaningfulness are associated with positive mental and physical outcomes (Pratt and Ashforth 2003). Therefore, it is important to consider the extent to which older adults are involved with productive activities, the predictors of that involvement, and the consequences of engagement with productive roles during later life.

Older Adults’ Participation in Productive Activities

Scholars consider a range of role sets as being productive, such as being an employee, a caregiver to family members, an informal helper to neighbors and friends, and/or a participant in education and training. In this chapter, we focus on two specific types of productive experiences: formal volunteering and self-employment. Although the specific activities and responsibilities of volunteers and self-employed entrepreneurs are likely to vary, older adults’ enactment of each of these roles could have market value and might align with their personal pursuit of purpose and meaning.

Volunteering as a Productive Activity

Volunteering has been heralded for the rewards that can accrue both to the individual volunteers and the organizations they serve (Kaskie et al. 2008; Morrow-Howell et al. 2009; Wheeler et al. 1998). We use Morrow-Howell's (2010) definition of volunteering as any activity "undertaken by an individual that is uncoerced, unpaid (or minimal compensation to offset costs), structured by an organisation, and directed toward a community concern" (p. 461) (Morrow-Howell 2010; Cnaan et al. 1996). Following Morrow-Howell (2010), our operational definition of volunteering does *not* include informal helping, caregiving, or making financial contributions to causes and organizations. Older adults who are making the transition from daily lives structured around paid work to crafting unpaid encore work may find that volunteer activities can help them pursue interests and fulfil responsibilities that were not part of their roles as workers. In the USA, older adults may participate in a range of volunteer activities, such as providing support to specific population groups, as with students and their teachers (e.g., Experience Corps) Fried et al. (2004); contributing time and competencies to charitable and nonprofit organizations (e.g., Encore volunteers) Freedman (2008); engaging in civic or political activities Zukin et al. (2006); or helping community-based programs. The specific contributions made by volunteers range from providing direct services (such as transporting people with disabilities to medical appointments), fulfilling professional and/or management functions (such as helping with fundraising), to ensuring that miscellaneous administrative tasks are completed (such as maintaining contact databases).

Volunteering is widely seen as a pathway toward a sense of meaning and purpose (Ryff and Singer 2008; Pinquart 2002). There is some evidence that older adults and younger adults may volunteer for different reasons. While younger adults seem to be motivated by personal and career development goals, older adults seem to be more interested in helping others, staying active Okun and Schultz (2003), and/or providing for future generations McAdams and Logan (2004). Some studies have tried to separate altruistic motives from more egoistic ones; however, Narushima (2005) points out that the two are intertwined. Having conducted interviews with volunteers in Toronto, she finds that older adults are motivated by both self-development and growth (learning opportunities) as well as by a desire to give back to their communities. She also reports that motives for volunteering can change over time. "What [may have] started as a primarily ideological and selfish social obligation, i.e. the desire to pay back to society, through direct

involvement, was gradually transformed into a more realistic community consciousness, i.e. the ‘need to work together to sustain our community’” (Narushima 2005, p. 579).

Self-Employment as a Productive Activity

Approximately one in nine Americans of working age is self-employed Hipple (2010). Self-employment can make it possible for older adults to continue to work and earn income in later life. In this chapter, we define self-employed older adults as individuals who work for themselves and (to a great extent) are in charge of how and when they conduct their work. There are four major types of self-employment: consultant, small business owner, entrepreneur, and social entrepreneur (with the categories not being mutually exclusive) (see Table 9.1). While much of the literature on self-employment in later life focuses on those aged 50 and older (e.g., Curran and Blackburn 2001; Harms et al. 2014; Weber and Schaper 2004), there is no consistent age range used to designate older workers in general, or self-employed older adults specifically (Pitt-Catsouphes et al. 2012).

Several motivations for pursuing self-employment in later life have been identified, including having always wanted to be self-employed or an entrepreneur, wanting to continue to work but to do so in an independent way rather than “working for someone else,” and perceiving few other options for earning income (Harms et al. 2014; Kautonen 2008; Singh and DeNoble 2003; Weber and Schaper 2004). The possibility of making a profit draws some older adults toward entrepreneurship; however, some seek entrepreneurial pursuits so that they can have opportunities to make a difference in the world. Older social entrepreneurs specifically pursue ventures that have a great deal of personal meaning and may enable them to leave a lasting, positive impact on society (e.g., Pitt-Catsouphes et al. 2014).

Approach to Data Analysis

Reflecting insights gained from our review of the literature, we use the conceptual framework depicted in Fig. 9.1 to guide our examination of the experiences of older adults in the USA who participate in volunteerism and/or self-employment.

For our study, we analyzed data from the only two datasets that gather information about older adults’ participation in productive activities

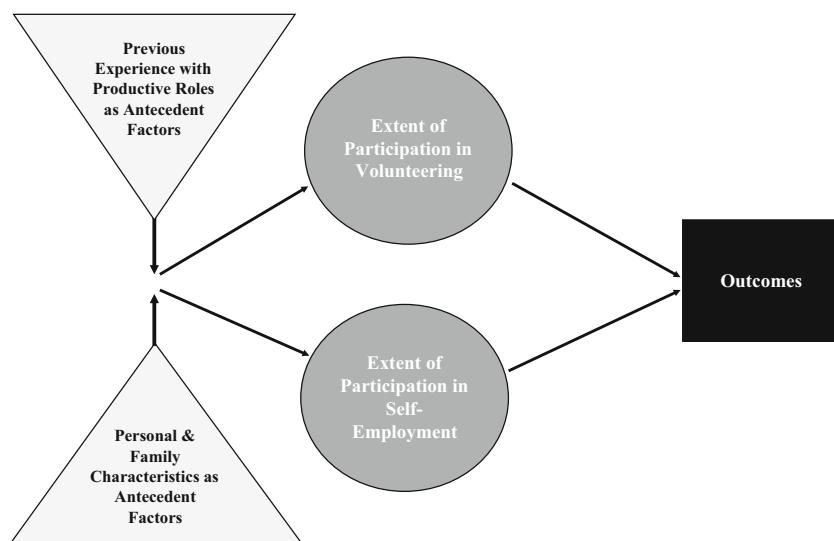
Table 9.1 Concepts and definitions related to the labor force participation of older adults

Term	Definition
Labor force participant	According to the United States Bureau of Labour Statistics, we can classify labor force participants into three broad categories: (1) older adults in the labor force who work for someone else (i.e., they are employees), (2) older adults in the labor force who are self-employed, and (3) older adults who are not currently employed but who are seeking work.
Older worker	The term “older workers” includes those who are employees as well as those who are self-employed. Just like there is no set age range for the encore stage described earlier in this chapter, there is also no single agreed-upon age range for older workers Pitt-Catsouphes et al. (2012). However, much of the literature on self-employment in later life counts those aged 50 and older as being an older worker (e.g., Curran and Blackburn 2001; Harms et al. 2014, Weber and Schaper 2004).
Self-employed worker	The term “self-employment” can encompass several different meanings. In general, we use it as a designation for individuals who work for themselves and are in charge, to a great extent, of how and when they conduct their work. There are four major types of self-employment: consultant, small business owner, entrepreneur, and social entrepreneur (with the categories not being mutually exclusive).
Consultant	Consultants are independent contractors who work on specific projects based on their skills and knowledge base. Consultants can sell services to individuals and organizations, including for-profit, nonprofit, and public sector organizations. They are only paid for this particular work and are not considered employees; therefore, they do not receive the same benefits or protections as employees when working for companies (United States Small Business Administration n.d.). They can be either incorporated consultants (i.e., they have incorporated their businesses) or unincorporated (i.e., they have <i>not</i> incorporated their business) Hippel (2010). While people in a range of occupational groups can become consultants, this line of work has become normative for many in professional services, such as management, scientific, and technical consulting services Henderson (2012).
Small business owner	The definition of a small business often reflects the level of revenue and the number of employees. The benchmarks for both of these sets of indicators can vary from one industry sector to another, which can make the designation of a small business somewhat elusive. For example, a small business in the manufacturing sector might be seen as a medium-sized business in the professional services sector. Some US federal labor policies, such as the Family and Medical Leave Act, provide exemptions for workplaces with fewer than 50 employees, implying that these are small businesses (Wage and Hour Division 2012). According to the United States Small Business Administration, small businesses, in general, have 500 employees or less in manufacturing or mining industries or \$7.5 million in average annual receipts for other industries (United States Small Business Administration 2014). Incorporated consultants and contractors are typically also small business owners, assuming their total revenues falls below the threshold set by the Small Business Administration.

(continued)

Table 9.1 (continued)

Term	Definition
Entrepreneur	The definition of an entrepreneur has been debated for centuries Dees (1998). Some of the current definitions are subjective and refer to individuals who perceive an opportunity and pursue it by creating an organization Bygrave and Hofer (1991). Others focus on the possibilities for making a profit through innovation by creating “purposeful, focused change in an enterprise’s economic or social potential” (Drucker 1985, p. 67). For the purposes of this chapter, we recognize self-employed individuals and small business owners as entrepreneurs (e.g., Curran and Blackburn 2001; Singh and DeNoble 2003; Van Solinge 2014).
Social entrepreneur	Social entrepreneurs comprise a category of entrepreneurs who design and implement initiatives with the goal of creating social value and addressing social problems. Social entrepreneurs may operate either in the for-profit or the nonprofit sector. Clarkin et al. (2012) have described the social entrepreneur as a “change agent who perceives an opportunity, adopts a mission to create and sustain social value, and relentlessly pursues new opportunities to serve that mission” (Clarkin et al. 2012, p. 21). In this chapter, we define social entrepreneurs as those who adopt a social mission for their work. In reality, however, social entrepreneurship and entrepreneurship are not dichotomous and are better described as lying on a continuum Austin et al. (2006).

**Fig. 9.1** Conceptual framework for productive activities

using national representative samples in the USA. The HRS is a nationally representative survey of households in the USA with at least one person aged 50 or older. Sample sizes from the HRS range from 22,000 to 25,000 in any given wave, with a total sample of over 37,000 respondents 50 and older residing in 23,000 households. Information about volunteering and self-employment from the HRS allowed us to explore the antecedents and outcomes associated with volunteering and paid work. In addition, we analyzed data from the volunteering supplement of the CPS, a nationally representative survey of 60,000 US households fielded each September to consider data relevant to time trends (such as the decline or increase in volunteerism and self-employment over the past decade) and comparative information about the participation of younger and older adults in productive roles.

Extent of Participation in Volunteering and Self-Employment

Our first set of exploratory questions address older adults' participation in productive activities:

- *What percentage of adults in the United States aged 50 and older volunteer? Do the rates change with age? Have the rates changed over time?*
- *What percentage of adults in the United States aged 50 and older are self-employed? Do the rates change with age? Have the rates changed over time?*

To address these questions, we used data from the 2004 and 2014 CPS. Table 9.2 shows trends in labor force participation rates, rates of being an employee, rates of being self-employed, and rates of volunteering in 2004 and 2014.

Trends in Volunteering

Rates of volunteering remained more or less consistent across all age groups in 2014, with approximately one in every four Americans volunteering. Comparing the rates of volunteerism in 2004 and 2014, it is possible to discern that volunteering rates in the USA have been in slow decline over the past 10 years for all of the age groups. Overall, the rate of volunteering decreased from 29.1 per cent in 2004 to 25.3 per cent

Table 9.2 Trends in participation, 2004–2014

	Older adults								Total
	16–49	50–54	55–59	60–64	65–69	70–74	75–79	80+	
Labor force participation rate									
2004 (N = 106,163)	77.3	80.1	71.1	50.8	28.7	15.6	9.5	4.7	66.0
2014 (N = 105,403)	74.1	78.1	71.6	56.2	32.0	19.5	11.0	6.0	62.9
Rates of being an employee among those in the labor force									
2004 (N = 70,748)	91.2	86.3	83.8	81.6	74.4	72.9	68.2	65.1	89.0
2014 (N = 66,348)	92.9	87.2	86.4	84.2	78.8	71.5	69.9	70.5	90.0
Rates of volunteering									
2004 (N = 91,116)	29.5	32.8	30.9	29.6	28.1	27.5	25.9	17.9	29.1
2014 (N = 88,458)	25.3	27.7	25.6	26.3	26.2	25.5	25.6	17.2	25.3
Rates of self-employment among those in the labor force									
2004 (N = 70,748)	8.8	13.7	16.2	18.4	25.6	27.2	31.8	35.0	11.0
2014 (N = 66,348)	7.2	12.8	13.7	15.8	21.2	28.5	30.2	29.5	10.0

Note: All percentages are weighted

Source: 2002 through 2014 Current Population Survey September Supplement

in 2014.² During this time period, the rates of volunteering among people in virtually all of the age groups peaked in 2004, then decreased. For younger people and the middle-aged (aged 16–49) and for the “youngest” old (aged 50–54 and 55–59), these declines ranged from 3.3 to 5.3 percentage points. Among the “older” old (those aged 75 and older), the declines were less substantial.

As discussed by Putnam (2000), there has been some concern voiced in the USA about decreases in civic engagement, indicating that there might be a growing disconnection between expressed values related to offering help to others and giving back to their communities and participation rates of volunteering (see, e.g., Musick and Wilson 2008). Some researchers suggest that the rates of volunteering

²We used two items from the September supplement of the Current Population Survey to measure rates of volunteering. “Since September 1 of last year, have you done any volunteer activities through or for an organization?” and “Sometimes people do not think of activities they do infrequently or activities they do for children’s schools or youth organizations as volunteer activities. Since September 1 of last year, have you done any of these types of volunteer activities?” Respondents who answered “yes” to either question were considered to be volunteers for the purpose of this analysis.

may be even lower than the findings of surveys suggest, as people who fill out surveys are already expressing a certain level of volunteerism and are therefore more likely to volunteer than the general population (Abraham et al. 2009).

Trends in Paid Work: Being an Employee and Being Self-Employed

As noted in Table 9.2, the percentage of older adults who remain in the labor force decreases as Americans get closer to the age of eligibility of Medicare (65 years) and Social Security (currently 67 for receiving full benefits). However, when comparing today's labor force participation rates with earlier decades, increasing proportions of older adults in the USA are now remaining in the labor force into their 60s, 70s, and beyond—a trend that is discussed in detail in other chapters in this volume.

The majority of Americans who are in the labor force work as *employees*; that is, they “get their pay check” from an organization or business owner. Compared to the *employee* population, the proportion of adults in the labor force who are *self-employed* is small; in 2014, only 10 per cent of all people aged 16 and older in the labor force were self-employed. However, compared to younger age groups, rates of self-employment are higher among older Americans. For example, in 2014, only 7.2 per cent of workers aged 16–49 were self-employed, but that percentage steadily increased with age, peaking at 30.2 per cent among 75–79-year-olds. Focusing on older adults who were self-employed, it is interesting to note that the rate of *self-employment* among those in the labor force was just 15.8 per cent among those 60–64 years of age, but that rate nearly doubles for those 75–79 years of age.

Our findings are consistent with the information included in previous literature. For example, Fairlie et al. (2015) found that for 11 of the past 19 years of study, Americans aged 55–64 had the highest rate or were tied for the highest rate of start-up activity among the age groups studied.

Antecedent Factors Associated with Volunteering and Self-Employment

The following questions focus on two sets of antecedent factors: (1) older adults' prior experience with the volunteering, and self-employment productive roles, and (2) individual/family characteristics that might explain variation in the participation of older adults in volunteering and self-employment.

Prior Experience with Selected Productive Roles

As adults transition from mid-adulthood to older adulthood, they may continue to assume roles that connect past, current, and future activities or they might experiment with new roles. For illustrative purposes, consider four groups of older adults: those who were in the labor force as employees during their mid-adult years, those who were self-employed during their mid-adult years, those who established “careers” as volunteers during their mid-adult years, and those who were neither in the labor force nor did they volunteer during their mid-adult years. Individuals in each of these groups might either continue in the same role(s) during their older adult years as they did earlier in their lives or they might pursue one (or more) of the other avenues for productive roles. The continuity theory of aging predicts that older adults are likely to continue to participate in activities *similar* to those of their earlier adult years Atchley (1989). It is, therefore, important to note that in many countries with advanced market economies, women as well as men who are now older adults have had fairly continuous labor force attachment throughout their mid-adult years. Furthermore, the dual earner couple household structure has become typical among married couple families (Bureau of Labour Statistics 2011, 2013; World Bank Data 2015). As a consequence, it should not perhaps be surprising that many of today’s older adults might want to incorporate work (paid or unpaid) into the rhythms of their daily lives as they age into the so-called “retirement years” McNamara et al. (2013). The continuity theory of aging also suggests that adults who maintain productive roles which are important to them into older adulthood will report positive outcomes associated with well-being.

While the continuity paradigm focuses our attention on the tendency for people to maintain some core roles and activities during their older adult years, it is important to recognize that the assumptions of this perspective do *not* preclude the possibilities that some older adults will seek change in sets of productive activities. A recent survey conducted by the American Institute for Economic Research (2015) found that 82 per cent of people who made a career change after the age of 45 reported that these transitions were successful, and a majority of them indicated decreases in stress levels.

For this study, we explored:

- *Are adults in the United States who volunteer earlier in life more likely to volunteer in later life than those who had not volunteered?*
- *Are adults in the United States who were self-employed earlier in life more likely to remain self-employed in later life than those who had either been employees or who had been unemployed?*

While the HRS dataset with which we worked allowed us to only look at a two-year time span between 2010 and 2012, our analyses confirmed that older adults tend to continue their volunteer patterns established earlier in life. We found that about half (52.49 per cent) of the survey respondents were nonvolunteers for both time periods. Just one in ten (10.18 per cent) of the respondents had moved from volunteering in 2010 to *not* volunteering in 2012. Nearly three in ten (29.54 per cent) volunteered at both time periods. The smallest percentage (7.79 per cent) were those who did *not* volunteer in 2010 but participated as a volunteer in 2012.

Similar patterns were observed for the paid work role. Among those not working (either unemployed or “retired”) in 2010, 92.62 per cent remained in that category in 2012 (with 5.29 per cent transitioning to being an employee and 2.10 per cent becoming self-employed). Among those who reported that they were employees in 2010, 82.18 per cent indicated that they were employees two years later (with 15.68 per cent transitioning to the not working category and 2.14 per cent becoming self-employed). Finally, among those who were self-employed in 2010, 78 per cent stated that they were still self-employed in 2012 (with 16.11 per cent becoming not working and 5.89 per cent becoming employees).

Personal and Family Characteristics

Personal factors, such as demographics (e.g., sex, age, etc.) and family responsibilities, may shape the patterns of older adults’ participation in both volunteering and self-employment. Our investigation explored:

- *Are personal and family characteristics associated with older adults’ participation in volunteering in the United States?*
- *Are personal and family characteristics associated with self-employment among older adults in the United States?*

Table 9.3 shows data from the 2014 September CPS for Americans in three age groups: 16–49 years, 50–64 years, and 65 and older. The demographic characteristics used for the analyses include gender, marital status, education, race, whether Hispanic, and whether immigrant.

Characteristics of Older Adult Volunteers: Volunteerism among older adults tends to be concentrated in more advantaged groups. As shown in Table 9.3, people who are married, have greater education, are white, non-Hispanic, and nonimmigrant are more likely to be volunteers. Our findings

Table 9.3 Selected personal and family characteristics

	16–49		50–64		65+	
	Employee	Self-employed	Employee	Self-employed	Employee	Self-employed
Gender						
Male	52.4	62.8	50.4	65.3	51.1	67.7
Female	47.6	37.2	49.6	34.7	48.9	32.3
Marital status						
Married	46.0	63.3	67.8	73.3	63.9	71.6
Widowed	0.5	0.4	3.3	2.8	11.9	11.3
Divorced	7.8	8.9	16.6	14.5	15.8	11.6
Separated	2.4	2.3	2.1	1.8	1.5	1.0
Never married	43.3	25.2	10.2	7.7	6.9	4.6
Education						
Less than high school	9.7	11.8	7.2	7.4	7.9	5.7
High school	26.6	26.9	29.7	27.8	28.4	23.9
Some college	30.7	27.4	28.1	28.1	26.7	26.0
Bachelor's degree or higher	33.0	33.9	35.0	36.7	37.0	44.4
Race						
White	76.9	82.6	81.1	88.2	84.8	91.0
Black	13.4	8.5	11.6	4.6	9.7	3.5
Other	9.7	8.9	7.4	7.2	5.6	5.5
Hispanic						
Yes	19.4	18.4	10.8	11.0	7.3	4.7
No	80.6	81.6	89.2	89.0	92.7	95.3
Immigrant						
Yes	18.5	24.0	16.8	20.0	14.0	10.1
No	81.5	76.0	83.2	80.0	86.0	89.9
N	39,327	3,180	16,726	2,836	3,185	1,094

(continued)

Table 9.3 (continued)

	16–49	50–64	65+			
Gender	Nonvolunteer	Volunteer	Nonvolunteer	Volunteer	Nonvolunteer	Volunteer
Male	52.0	41.5	49.8	43.3	45.0	40.7
Female	48.0	58.5	50.2	56.8	55.0	59.4
Marital status	0.0	100.0	0.0	0.0	0.0	100.0
Married	40.4	54.0	63.0	73.2	54.7	63.6
Widowed	0.7	0.5	4.6	4.0	26.7	21.1
Divorced	7.3	7.0	17.7	13.7	12.4	10.4
Separated	2.6	1.7	2.8	1.4	1.2	0.8
Never Married	49.1	36.8	11.9	7.8	5.0	4.1
Education	0.0	100.0	0.0	100.0	0.0	100.0
Less than high school	17.2	10.7	12.7	3.4	19.7	4.8
High school	29.7	16.4	35.4	19.8	36.8	23.8
Some college/ associates	29.2	30.2	27.2	28.7	22.8	27.3
Bachelor's degree or higher	23.9	42.8	24.7	48.1	20.7	44.1
Race						
White	74.7	80.5	79.6	85.4	84.2	90.1
Black	14.5	10.6	12.7	9.3	9.6	6.9
Other	10.8	9.0	7.7	5.3	6.1	3.0
Hispanic						
No	77.5	87.4	87.3	93.3	91.2	96.6
Yes	22.5	12.7	12.7	6.7	8.8	3.4
Immigrant						
No	78.9	87.5	81.3	89.7	84.5	93.6
Yes	21.1	12.5	18.7	10.3	15.5	6.4
N	34,016	12,588	16,959	6,582	13,816	4587

Note: All percentages are weighted

Source: 2014 Current Population Survey September Supplement

are consistent with previous literature, which has shown that those who do volunteer tend to have more education, higher income, better health, and at least some religious involvement Morrow-Howell (2010). They also tend to be white (Brown and Warner 2008, Musick and Wilson 2008) and female (Moen and Flood 2013). Older men (ages 60–70), however, are more likely to formally volunteer than are younger men (ages 45–49) Moen and Flood (2013).

Characteristics of Self-Employed Older Adults: A range of factors which reflect the human, financial, and social capital that individuals might bring to an entrepreneurial activity (e.g., individuals' education, work experience, financial abilities, and professional networks) help to explain some of the variation in older adults' ability to move from *being interested* in starting a new venture to *actually doing so* (Meyskens et al. 2011; Weber and Schaper 2004). Van Solinge (2014) found that retirees in the Netherlands were more likely to pursue self-employment if they had high levels of financial and human capital. For example, someone with more management experience and education (i.e., human capital), access to liquid assets and other sources of funding (i.e., financial capital), and personal and business contacts (i.e., social capital) may be in a better position to successfully launch and grow a business than someone with fewer of these attributes even when the motivations of people with fewer of these resources are just as strong.

As shown in Table 9.3, the self-employed in the USA are more likely to be male, married, have a bachelor's degree or higher education, be white, non-Hispanic, and nonimmigrant. Some of these differences are particularly noticeable among older age groups. For instance, within the 65 and older age group, 44 per cent of the self-employed have a bachelor's degree or higher, compared to 37 per cent of those who are employees. This compares to 33.9 per cent of the self-employed and 33 per cent of employees in the 16–49 age group.

In many ways, the characteristics of people who are likely to be self-employed mirror those of people likely to volunteer, but with a noticeable gender difference. However, volunteers are more likely to be female, the self-employed were more likely to be male. In terms of personal and family characteristics, the self-employed tend to be concentrated in more advantaged groups. While additional research is needed to explain these variations, it is likely that older adults with more human capital, financial capital, and social capital not only have more access to resources needed for the transition to self-employment (including professional contacts, loans needed for start-up, and specific types of business skill sets), but they also have "buffers" against some of the risks.

Benefits Associated with Volunteering and Self-Employment

In the past, it has been normative for working older adults to transition into retirement “overnight”; however, the research literature suggests that it can be beneficial for older adults to have options for engaging in transitional, productive roles. For instance, Dave et al. (2006) analyzed seven waves of the HRS and found that the act of fully retiring (defined as no longer being a part of the paid workforce) leads to increased difficulties associated with illness conditions, mobility, other daily activities, and mental health. Indeed, most current research shows that staying active and engaged through paid and unpaid work is associated with increased well-being.

Volunteering seems to be an especially beneficial role for older adults, in part because volunteer activities can serve as a replacement for the known benefits of work and family roles that typically become less salient in later life (Anderson et al. 2014; Moen and Fields 2002; Van Willigen 2000). Research has shown that volunteering among older adults is correlated to increases in well-being (Morrow-Howell et al. 2003; Greenfield and Marks 2004); mental health Li and Ferraro (2005); physical health (Onyx and Warburton 2003; Thomas 2011); and even mortality (Musick et al. 1999; Thomas 2011). Recently, there has been evidence of cause and effect, such that older adults in a pre- and post-test design intervention study who volunteered 15 h/week in a public school showed greater increases in physical activity, strength, social support, and cognitive activity in comparison to a control group who were on a waiting list to be a volunteer (Tan et al. 2006; Fried et al. 2004). The findings of an investigation conducted by Matz and colleagues suggest that the relationships between volunteering and well-being among older adults are stronger when older adults make physical, cognitive, and emotional commitments to their volunteer activities Matz-Costa et al. (2012).

Self-employment in later life may bring several benefits, including continued income, increased flexibility and autonomy compared to working for someone else, and expanded opportunities to pursue personal interests. Although there is limited published literature documenting the benefits of self-employment in later life, one study which focused on monetary benefits found that, in addition to creating jobs for themselves, older entrepreneurs tend to retire later and earn more income than wage and salary workers; however, they also tend to have fewer pension and insurance benefits Zissimopoulos and Karoly (2007).

In Table 9.4, we present data on potential benefits of volunteering and self-employment from the 2012 HRS. We focus on three sets of outcome measures that are indicators of well-being: loneliness (from the UCLA loneliness scale), depressive symptoms (from the adapted CESD), and life satisfaction (from the adapted Diener Life Satisfaction Scale), comparing both unadjusted mean scores (i.e., raw means) and mean scores adjusted for race, education, marital status, self-rated health, income, assets, and age.³

Benefits Associated with Volunteerism

The findings we present in Table 9.4 are consistent with the growing literature on volunteerism. Being a volunteer—whether in both 2010 and 2012 (i.e., a “continuing” volunteer) or in 2012 only—is associated with lower levels of depression ($p < .001$) and greater life satisfaction ($p < .05$, $p < .001$), as compared with not volunteering at either time. Importantly, those who volunteered for a period of time but then stop are not significantly different from those who did not volunteer at either time, indicating that the effect on the outcomes we measured can be lost over time. Those who volunteered at both time points also reported significantly lower loneliness than those who did not volunteer at either time ($p < .001$).

Benefits Associated with Self-Employment

The outcomes for older adults who reported being self-employed were similar to those who were in the labor force as an employee. That is, despite the demands and risks that can be associated with self-employment, this productive role does *not* lead to more (or less) loneliness, an increase (or decrease) in depressive symptoms, or less (or more) life satisfaction than being an employee. These findings are consistent with studies that have found that paid work in

³ Loneliness: A modified version of the UCLA loneliness scale, which asks respondents to rate (on a three-point scale ranging from “often” to “hardly ever or never”) “How much of the time do you feel...”: you lack companionship; left out; isolated from others; that you are “in tune” with the people around you; alone; that there are people you can talk to ; that there are people you can turn to; that there are people who really understand you; that there are people who you feel close to; part of a group of friends; that you have a lot in common with the people around you.

Depressive Symptoms: Centers for Epidemiologic Studies – Depression measure developed by RAND. Life Satisfaction: Mean of five items adapted from the Diener Life Satisfaction scale (seven-point scale), measuring agreement with the following statements: “In most ways my life is close to ideal.” “The conditions of my life are excellent” “I am satisfied with my life.” “So far, I have gotten the important things I want in life.” “If I could live my life again, I would change almost nothing.”

Table 9.4 Loneliness, depressive symptoms, and life satisfaction in 2012, aged 50 and older

	Mean volunteering		Self-employment	
	Unadjusted	Adjusted	Unadjusted	Adjusted
Loneliness (N = 6,880)			Loneliness (N = 6,358)	
Not a volunteer in 2010 and 2012 ^a	1.60	1.55	Not employed in 2010 and 2012 ^a	1.57
Volunteer in 2010 only	1.53	1.52	Employee in 2010 and 2012	1.48
Volunteer in 2012 only	1.51	1.51	Self-employed → Employee	1.48
Volunteer in 2010 and 2012	1.40	1.43***	Employee → Self-employed	1.43
			Self-employed in 2010 and 2012	1.41
			Not employed → Employee	1.46
			Not employed → Self-employed	1.53
Depressive symptoms (N = 18,009)			Depressive symptoms (N = 16,612)	
Not a volunteer in 2010 and 2012 ^a	1.74	1.48	Not employed in 2010 and 2012 ^a	1.79
Volunteer in 2010 only	1.44	1.45	Employee in 2010 and 2012	1.05
Volunteer in 2012 only	1.24	1.24***	Self-employed → Employee	0.77
Volunteer in 2010 and 2012	0.95	1.18***	Employee → Self-employed	0.65
				0.80***

(continued)

Table 9.4 (continued)

	Mean volunteering		Self-employment		
	Unadjusted	Adjusted	Unadjusted	Adjusted	
Life Satisfaction (N = 6,448)			Self-employed in 2010 and 2012	0.86	1.10***
Not a volunteer in 2010 and 2012 ^a	4.51	4.71	Not employed → Employee	1.27	1.11***
Volunteer in 2010 only	4.73	4.80	Not employed → Self-employed	1.41	1.38
Volunteer in 2012 only	4.89	4.92*	Life satisfaction (N = 5,951)		
Volunteer in 2010 and 2012	5.16	5.06***	Not employed in 2010 and 2012 ^a	4.72	4.85
			Employee in 2010 and 2012	4.81	4.87
			Self-employed → Employee	4.74	4.66
			Employee → Self-employed	5.14	4.92
			Self-employed in 2010 and 2012	5.07	4.79
			Not employed → Employee	4.63	4.78
			Not employed → Self-employed	5.09	4.99

Note: Both unadjusted and adjusted means are weighted using person-level weights. Adjusted means additionally control for race, education (centered), marital status, self-rated health (centered), log of income (centered), log of assets (centered), and age (centered). Significance levels compare each category to the reference, indicated with the superscript ^a.

Source: 2010 and 2012 Health and Retirement Study data

* p < .05, ** p < .01, *** p < .001

later life (whether as an employee or as a self-employed individual) can be associated with positive well-being depending on the quality of the work tasks and the worker's level of engagement (Calvo 2006; Matz-Costa et al. 2012).

Discussion and Conclusion

Recognizing the positive outcomes that can be associated with the participation of older adults in productive activities such as volunteering and employment (including self-employment), proponents of healthy aging often advocate for the increased involvement of older adults in these activities. We have presented findings which suggest that continued involvement in productive activities such as volunteering and self-employment is associated with positive outcomes for older adults.

However, it is important to remember that the benefits of older adults' participation in productive aging activities may depend on perceived role quality. Matz-Costa et al. (2012) found that the *quality* of productive activities has a stronger relationship with older adults' well-being than the *quantity* of activities (with role quality being conceptualized as affective engagement in the activities that was measured by older adults' self-assessments of their absorption in, vigor associated with, and dedication to specific types of productive activities). That is, older adults reporting high levels of engagement with volunteering and paid work tend to report high levels of well-being. On the contrary, those who participate in more activities but who are not affectively engaged in them report lower levels of well-being. Therefore, older adults should carefully assess the congruence between their own priorities and the likelihood that specific opportunities for volunteering or self-employment will foster positive, affective states.

Research suggests that a variety of institutional factors can limit older adults' participation in volunteering. Morrow-Howell (2010) reports that older adults often have tenuous connections with organizations that frequently use volunteers (e.g., school systems or nonprofits in the social services/health care sectors), which, in turn, may decrease the likelihood of volunteerism. Lack of outreach efforts that specifically target older adults can also affect volunteering rates. While older adults tend to respond positively when they are invited to volunteer, they may wait until they receive information about volunteer opportunities before they seek out new and unfamiliar opportunities (Morrow-Howell 2010).

Researchers have found that structural barriers, such as transportation problems or the types of volunteer positions available, can discourage older

adults who might otherwise be interested in volunteering. Transportation constraints make it difficult for older adults who live in remote locations to volunteer. Older adults also find it complicated to volunteer for organizations that are located in inaccessible neighborhoods (McBride, 2006/2007). Moen and Flood (2013) have examined the phenomenon of the mismatch of volunteer work with older adults' preferences, and they point to the program Teach for America as but one example of the possible lack of "fit." Unfortunately, these barriers seem to be particularly constraining for less economically advantaged older adults who, ironically, stand to benefit the most from such activity (Morrow-Howell et al. 2009; Musick et al. 1999; Piliavin and Seigl 2007). The lack of compensation as well as other institutional arrangements, such as the structure of the volunteer role, may have the unintended consequence of excluding older adults—minorities in particular—from volunteer activities.

There are steps that organizations might take to increase the likelihood that older adults will volunteer and will derive benefits from their participation in this type of productive activity. In a study of older adults involved in 13 different volunteer programs, Morrow-Howell et al. (2009) found that volunteers who received stipends had higher perceptions of benefits associated with volunteering, such as personal growth and health, than unpaid volunteers. Furthermore, the managers at community-based programs could make an effort to communicate to older adults that their contributions are having a positive impact on the lives of those served by the organization. Older adults might find volunteer activities more meaningful and satisfying if the contributions they make are visible and recognized by the organization Morrow-Howell et al. (2009). There are indications that well-designed volunteer training and supports may enhance the quality of the volunteer role; furthermore, training appears to increase the retention rates of older volunteers Narushima (2005). In summary, Chappell and Prince (1997) suggest that the rates of volunteerism among older adults could increase if organizations expanded the types of strategies used for disseminating information about volunteer opportunities; made changes in some of the management practices related to volunteering (e.g., orientation and training); and increased the types of volunteer tasks available so that older adults could chose activities that are meaningful to them.

If enacted, public policies could increase the incentives and decrease the disincentives that can be associated with older adults' participation in volunteer or entrepreneurial activities. Older adults wanting to launch an entrepreneurial initiative might benefit from loans or insurance programs targeted specifically for older entrepreneurs. Volunteers might find stipends or access to resources that have monetary value helpful. Appropriate education and

training that respect the life experience of older adults could appeal to people who intend to assume new volunteer or entrepreneurial roles that are a departure from roles they assumed earlier in their adult lives. Innovative public policies focused on providing supports for older adults interested in volunteering and entrepreneurship could complement existing policies that foster healthy aging.

Researchers are just starting to build the knowledge base about the older adults who engage in volunteering activities and/or entrepreneurial ventures. Rigorous, longitudinal studies could extend our understanding of the relationships between productive activities experienced during mid-adulthood and productive roles assumed during later adulthood. Intervention studies could identify resources, programs, and services that augment positive outcomes for those older adults who want to engage in either volunteering or self-employment. For example, researchers could examine whether rates of success and satisfaction are higher among older adults who have enrolled in courses (such as a course that helps older adults interested in entrepreneurial activities to prepare a business plan) compared to those who have not had such opportunities.

At the turn of the twenty-first century, Hinterlong et al. (2001) noted, "... advocates of productive aging hope to ensure that older adults are allowed to choose the forms of engagement that best fit their needs, interests, and skills, and that have the potential to product benefits to others" (p. 4). In contrast to the extensive documentation of the intention of older adults in the USA to "work longer," less attention has been directed toward the development of knowledge about other transitional pathways of paid and unpaid work that older adults pursue into their later adult years. While many working older adults might want to continue to work for their current employers, others might want to experiment with new roles either as volunteers or self-employed entrepreneurs.

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10

Bridge Employment: Transitions from Career Employment to Retirement and Beyond

Carlos-María Alcover

Introduction

The last quarter of the twentieth century and the early years of the twenty-first ushered in far-reaching, rapid change in terms of socio-demographic factors, economic circumstances, and working conditions on a scale never before witnessed in history. In particular, the sustained rise in life expectancy over recent decades and the steep fall in the birth rate have accelerated the process of population ageing, generating powerful, worldwide effects (Lutz et al. 2008). While there are still significant differences between the more developed, less developed, and least developed countries (United Nations 2013), the gap between them is rapidly closing (Bongaarts 2004), and in the context of these global demographic shifts, employee retirement has become an important, indeed a core, element of political and socio-economic discourse and a key factor in the area of human resource management (HRM) (Wang and Shi 2014). The goal is to maintain older workers at work, extend working life, and avoid mass exodus from the labour market.

The global share of older people (i.e. those aged 60 years or over) increased from 9.0 per cent in 1994 to 12.0 per cent in 2014, and it will continue to grow as a proportion of the world population to reach 21.1 per cent by 2050

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(United Nations 2013, 2014). In the more developed regions, meanwhile, the proportion of the population aged 60 years or over was 12 per cent in 1950, rose to 23 per cent in 2014 and is expected to reach 32 per cent by 2050. In absolute terms, the number of people aged 60 years or older has almost doubled between 1994 and 2014, and people in this age group now outnumber children under the age of 5. From 1994 to 2014, Asia added the largest number of older people (225 million), accounting for almost two-thirds (64 per cent) of global growth. By 2050, 24 per cent of Asia's population will be aged 60 years or older. While the growth in the number of older people was fastest in Latin America and the Caribbean and second fastest in Africa from 1994 to 2014, the contribution of these regions to the global growth in the population of older people (33 and 29 million older people, respectively) was relatively small, and together, accounted for only 17 per cent. In 2050, Latin America and the Caribbean region will reach 25 per cent of population aged 60 years or older, and Africa will reach 9 per cent in this age group. The growth of the older population in this 20-year period was slowest in Europe, yet it added more older people to its population (38 million, or 11 per cent of the global increase) than any other major area, except Asia. In 2050, the regions of Europe and North America will have 31 per cent of the population aged 60 years or older (see Fig. 10.1; United Nations 2014).

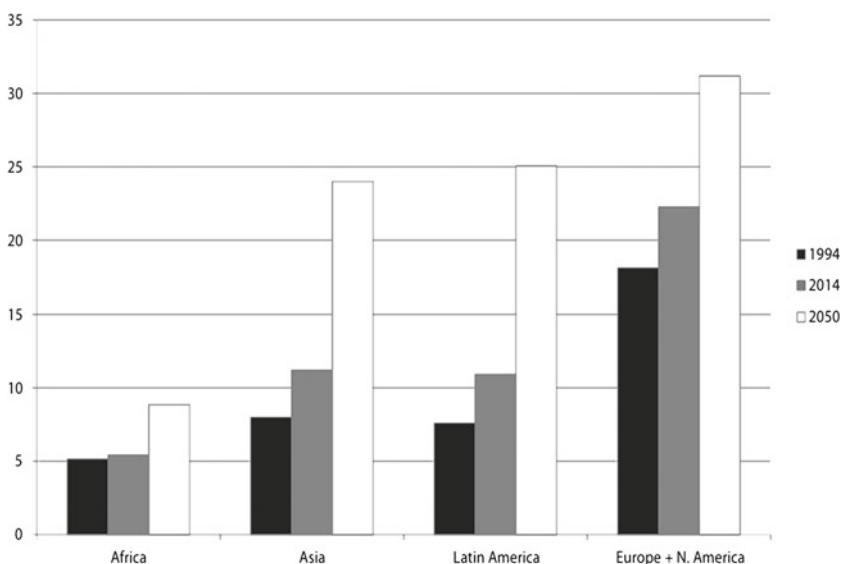


Fig. 10.1 Percentage of the population aged 60 years or older, for major areas, 1994, 2014, and 2050 (Source: United Nations 2014, p. 24)

Since the 1950s, support for the elderly in advanced countries has been provided primarily in the form of public pensions and on a secondary basis via private prudential and savings arrangements, and by public healthcare systems, following the solid pattern set by the Welfare State. It is widely recognised that these programmes have been successful in closing the income gap between the elderly and the working-age population, and financial security and well-being rates among the elderly have risen substantially in contemporary societies. However, the cost of widely implemented pay-as-you-go public pensions, which rely on transfers from younger to older cohorts, has grown increasingly burdensome for contributors and will eventually become unsustainable as old-age dependency rates rise to high levels (Bongaarts 2004). In the second half of the twentieth century, moreover, the number of older people participating in the labour force shrank rapidly. For example, 81 per cent of men aged 62 years were in work in the USA in 1950, but this share had slipped to just 51 per cent by 1995 (Coile and Gruber 2007).

In most developed nations, the official retirement age is around 65 years, although the female retirement age is lower in some countries like Italy, Japan, Brazil, and Chile where women can retire at 60, or China and Russia, where they can retire at 55 (Peiró et al. 2013). The retirement age was originally set at 65 years in Germany in 1883, a time when most people would die before they qualified for a pension, so that the fledgling public pensions system involved only a very small financial burden for the state. The situation has since changed almost beyond recognition, in terms not only of longevity but also of typical work requirements, so that the once backbreaking physical demands of labour have given way to ever greater cognitive and emotional demands. In many countries, however, these developments are not reflected in the formal or mandatory retirement age (Baruch et al. 2014), although a significant number of countries have now taken steps to extend the retirement age gradually at least to the age of 67, as in Germany, France, Spain, Australia, the USA, and Denmark (de Preter et al. 2013; Peiró et al. 2013). Moreover, abolition of the fixed retirement age is now mooted in some quarters (Baruch et al. 2014; Sargent et al. 2013). As indicators of this growing trend, and following the USA, other developed countries such as Australia, Canada, and the UK have moved recently to abolish mandatory retirement in the labour market (Kunkel et al. 2014; Leeson and Khan 2015). And in countries where population ageing is very rapid, such as Japan and South Korea, the claims to abolish the mandatory age are increasing (Higo and Klassen 2015).

Progressive increases in the age at which people retire depress the pensioner/worker ratio by simultaneously reducing the number of retirees and raising the number of workers. Furthermore, this policy lowers the old-age

dependency ratio calculated as the ratio of people over the age of 65 to those aged 15–64 years (Bongaarts 2004). These trends clearly show that both governments and society, not to mention academics and researchers, have finally realised that people will have to work for longer to maintain existing pension arrangements and assure the financial and social well-being of an ever older population, as well as adequate healthcare for the aged. Furthermore, increasing numbers of workers now stay on at work beyond the usual retirement age, preferring to leave their occupations stepwise as they grow older in response to both economic incentives and intrinsic motives (Beehr and Bennett 2015; Silcock 2012).

Social security and pension systems in many countries have changed in recent years in ways that are now less likely to discourage work later in life (Cahill et al. 2013b). This means that employees can plan their own retirement benefits and take responsibility for providing their own financial and material resources (Munnell 2006), shifting retirement planning from a “standard or defined” model to a “do-it-yourself” model. This trend is exemplified in the data provided by Cahill et al. (2013a), who find that the “do-it-yourself” retirement planning, in which individuals manage a large portion of their own retirement finances and resources themselves, has now become the most common approach among older Americans belonging to the last three cohorts of older workers (from 1992 to 2010).

Though older workers’ reasons for staying on in the labour market may differ, the results of a meta-analysis (Kooij et al. 2011) suggest that they do so basically to satisfy intrinsic interests related with the nature of the work, the satisfaction it provides and the motivation of success, for social reasons, and to gain financial security.

The conventional notion of a single professional career running in a straight line through to mandatory full retirement from the labour force, possibly without ever changing jobs or employer, has now begun to crumble under pressure from the new sociological realities in the workplace. In fact, modern working life implies a multidirectional career model allowing numerous different options and paths.

On the one hand, the “career job” is giving way to non-linear paths like the boundaryless career (Arthur and Rousseau 1996), characterised by mobility, flexibility, the development of knowledge and networks, and personal responsibility for one’s own career direction (Inkson 2008), or the protean career (Hall 2002), which emphasises a self-directed career approach driven by personal values (Briscoe and Hall 2006). Those who venture onto these paths will not, therefore, always be in a conventional career job (Cahill et al. 2013a). Meanwhile, even those coming to the end of

a conventional job or career need not necessarily give up paid work entirely but may agree to extend their working lives applying flexible occupational formats, or they may decide to return to the labour market after a few years of retirement (Beehr and Bennett 2015). Recent data show that 20 per cent of American workers over the age of 50 considered themselves to be working in retirement, and the majority of non-retired workers aged 50 or older planned eventually to work in retirement (Brown et al. 2010). Additional data revealed that between 15 and 26 per cent of retirees later re-entered the workforce (Cahill et al. 2011; Cahill et al. 2013a; Maestas 2010), a kind of retirement transition which has been dubbed “unretirement” (Maestas 2010). These trends clearly challenge traditional understandings of retirement as a clear-cut and permanent or definitive exit from the labour force (Brown et al. 2014).

In this light, the concept of retirement appears difficult to define and its boundaries increasingly diffuse (Beehr and Bowling 2013). Retirement decisions imply multiple choices but not a simple work/non-work dilemma, because retirement takes many and varied forms (Beehr 2014). Over the past two decades, the conceptualisation of work and retirement as opposite states has become obsolete among older workers in most developed countries (Cahill et al. 2013b), and models conceived within the work/non-work dichotomy can no longer accommodate the new ways of living that men and women now aspire to when they reach and pass 60 years of age (Alcover et al. 2014a). For research purposes, an early formal taxonomy classified retirement types along three dimensions: early versus on-time, voluntary versus involuntary, and partial versus complete retirement (Beehr 1986). These types were each defined as continuous rather than discrete dimensions, so that employees could retire somewhat early, somewhat voluntarily, or somewhat completely (Beehr and Bennett 2015). Therefore, retirement can be considered as a process rather than a single, one-off event (Beehr and Bennett 2007). This process lasts for a variable period of years (Shultz and Wang 2011; Szinovacz 2003), in which older individuals are faced with a set of possible combinations of paid work and time out from the labour force (Pleau and Shauman 2013). One of the main consequences of the trend towards the prolongation of working life and the use of alternative working practices in late career has been the replacement of the concept of trajectory by that of transition to define the work–life cycle (Elder and Johnson 2003). From a psychological perspective (Shultz and Wang 2011; Wang and Shi 2014), then, retirement is a longitudinal developmental process through which workers gradually reduce their psychological attachment or commitment to work and behaviourally withdraw from the labour force (Wang 2013).

The logical consequence of these changes in the concept of retirement has been to redefine the mid- and late career stages of older workers. As the mandatory retirement age approaches, older workers begin to plan their future. For some individuals, this career stage may represent a period of uncertainty, doubt, and crisis, while for others, it holds the hope of change, opportunities for career development, and a fruitful transition to full retirement (Nuttman-Shwartz 2004). The new, modern career offers several significant advantages for older employees, including greater freedom and a more flexible career course (Hall and Mirvis 1995). Late career workers enjoy increased freedom of choice and the resources to pursue personal options and self-fulfilment (Wang et al. 2013), at least in work contexts involving high levels of employment, and in certain professions and occupations. As various scholars have noted (Arthur and Rousseau 1996; Mirvis and Hall 1994), the old work contract was with the organisation, but the new career contract is with the individual and his/her work. Long-term contracts based on loyalty, security, lifetime employment, and mutual commitment have been replaced by short-term contracts, low loyalty, and more flexible work arrangements (Baruch 2004). Thus, individual needs and environmental opportunities and challenges create a scenario featuring multiple career paths between which individuals can choose in pursuit of their own (private, personal, family) and professional needs over the course of their lives—a career model which Valcour et al. (2007) have labelled the “customised career”. As Voelpel et al. (2012) have noted, *“one of the future tasks of organisations and career development will be teaching how to deal with the increased freedom, how to pursue a more self-responsible career, and how to adapt to a new work identity, and strengthen job as well as career skills”* (p. 505). Nevertheless, recent data reveal the existence of significant differences between the USA and the UK in terms of the kinds of jobs which organisations are willing to offer older workers and those returning to the workforce. British employees over the age of 65 were disproportionately segregated, in comparison with the US labour market, into less desirable “Lopaq” occupations (low-paid, often part-time, jobs requiring few qualifications) (Lain 2012). This suggests that organisations (and government policy) should seek not only to encourage older workers to prolong their working lives but also to ensure that they are offered quality jobs.

To sum up, the new flexibility, freedom, and autonomy found in mid-to-late career seem tailor-made for older employees’ mindsets, and a growing number of people now choose options to prolong their working lives beyond the age of 60, including bridge employment, entrepreneurship or self-employment, and labour market re-entry.

The purpose of this chapter is to discuss, first, types, conceptualisation, and characterisation of bridge employment, offering a brief review of recent literature on this concept; second, a synthesis of antecedents and consequences of bridge employment decisions, highlighting main benefits for individuals, organisations, and societies as a whole; and the chapter will end by introducing a new look at bridge employment, namely, conceptualising mature and old workers engaged in bridge employment as “job crafters” who are actively engaged in meaningful work in the later years of their career.

Bridge Employment: Types, Conceptualisation, and Characterisation

Just as retirement is a difficult concept to pin down precisely (Beehr and Bowling 2013; Denton and Spencer 2009; Wang & Schultz, 2010a), the concept of bridge employment refers to a whole range of different possible work situations (Beehr and Bennett 2015). The most common definition of bridge employment refers to any kind of paid work (part-time, full-time, or self-employment) carried on after the end of an individual’s professional career or full-time employment before complete withdrawal from the labour force or retirement (Cahill et al. 2013b; Feldman and Kim 2000; Gobeski and Beehr 2009; Shultz 2003). Bridge employment alternatives may therefore be considered modalities of retirement that prolong working life, allowing the term “full retirement” to be used to refer to final withdrawal from the workforce (Gobeski and Beehr 2009). The transitions characterising bridge employment occur both within the individual’s own profession and in other occupations, and they can take the form of (full- or part-time) wage-and-salary employment, permanent or temporary jobs, and self-employment (Alcover et al. 2014a; Beehr and Bennett 2007).

However, the label “bridge” employment may be incorrect in the main assumption. As Beehr and Bennett (2015) have recently noted, older workers can retire from one job and take a second job, but never completely withdraw from the labour force. In this case, bridge employment is a bridge to a new career stage, a bridge to nowhere, or a bridge to the death if the person decides to prolong his/her working life until that event. In addition, there are people who, after retirement (early or at the mandatory age), enter and leave the workforce more than once, re-entering during variable periods of years, depending on health, personal or family factors (Cahill et al. 2011, 2013a; Shultz 2003). In sum, “the first job is a bridge to full retirement for a time, but

not forever, instead they may ‘unretire’ or reenter the workforce any number of times” (Beehr and Bennett 2015, p. 113).

Cahill et al. (2013a) recently suggested a model to illustrate retirement options. These authors identified six periods through which older workers pass (or may pass) in their transition from full employment to permanent or definitive retirement. Period 1 refers to full-time career employment, which may continue beyond the age of 50 to different ages. Period 2 is referred to as phased retirement (from the career job), involving a variable reduction in the number of working hours. As in the case of period 1, this may last several years. Period 3 consists of the bridge job (a new job, or jobs), involving a variable reduction in the number of working hours compared to the preceding job over a period of years. Period 4 consists of temporary retirement in which the individual may “take a break” from the labour market, although without the intention of permanent retirement. Period 5 consists of re-entry, and it involves a return to work, either in the same or in a new job, with a variable number of hours. This stage may last for a period of some years. Finally, period 6 consists of complete withdrawal from the labour force (“retirement”) and the definitive end of working life. The choices and opportunities arising over the course of these periods will depend on macroeconomic factors (e.g. the situation of the labour market), organisational factors (e.g. policies applied to the retention of older workers and to the recruitment and hiring of early retirees), work-related factors (e.g. work conditions, work stress, job satisfaction), and personal factors (e.g. state of health, level of income, family situation) (Cahill et al. 2013a; Mulders et al. 2013; Pattani et al. 2004; Perera et al. 2015). Hence, these factors and others like them will condition the number and duration of the possible career transitions through which older workers pass.

In our opinion, the conceptualisation of Cahill et al. (2013a) is very useful for its heuristic value, as it contains multiple job options in the process from full employment to full retirement. However, we consider bridge employment as any type of work (including phased retirement) that follows a career job but precedes full labour force withdrawal. Hence, it includes any variable reduction in the number of working hours, or alternative flexible working conditions, such as a compressed week, discontinuous schedule, and so on. A bridge job can begin at any moment from 50 years to 65 or over (i.e. someone under 50 working part-time cannot be considered to have a bridge job), and may or not require a change of employer. In addition, we also consider a bridge worker who moves from career job to self-employment, even though he/she also works full-time in his/her new entrepreneur position. Finally, we understand that a worker who has held a number of different jobs with different

employers (even if they have had the same occupation) also happens to be a bridge worker when, at the age of 50, he/she engaged in any employment patterns identified in the Cahill et al. (2013a) model. Thus, in a broad sense, we consider bridge employment as any modality of extended work later in life.

Beehr and Bennett (2015) have recently proposed a classification based on the different types of bridge employment described in the literature, combining the four usual dichotomies: (a) employment in career jobs versus non-career jobs, (b) flexible but predictable versus contingent jobs (e.g. reductions in workload or working hours agreed with the current employer versus sporadic work for any employer), (c) career jobs versus organisational jobs (e.g. work in the same professional field versus work in the same organisation), and (d) self-employed versus other-employed, which could be broken down still further, depending whether the “other” is the same employer as in the career job or a different employer. These four dichotomous category pairs are not mutually exclusive but can be crossed with each other to generate 16 different categories of bridge jobs, as illustrated in Tables 10.1 and 10.2.

Aside from this proposed taxonomy, bridge employment can be conceptualised in different ways, applying the same theories as already applied to retirement. In particular, role theory, continuity theory, the life course perspective, and the rational choice theory are commonly used as frameworks to understand the drivers behind the decision to engage in work after retirement (Wang et al. 2009; Wang et al. 2008). In an interesting attempt to organise these theoretical frameworks, Feldman and Beehr (2011) outline several theories that can be applied to retirement decision-making via a three-phase model. In Phase 1, titled “Imagining the Future: the Possibility of a Future Retirement”, employees do not specifically plan retirement but rather mull over the possibility in a general, abstract way. Research on individual differences, image theory, continuity theory, and social identity theory is particularly helpful in understanding workers’ initial thoughts about retirement. In Phase 2, “Assessing the Past: Deciding the Time to Let Go”, researchers usually prefer to take a career transition approach, viewing retirement as a “normal” phase of an individual’s life and career rather than treating it as a discrete (and disruptive) event that creates major discontinuities in people’s lives. Researchers taking this approach use career stage, life stage, and family stage theories to explain how workers decide the optimal time for them to retire, when they can move into retirement with a positive sense of accomplishment for past career achievements, and to throw light on individuals’ feelings of work disattachment or disengagement before they actually retire. Finally, in Phase 3, “Transitioning Into Retirement: Putting Plans Into Action”, older workers must make a firm commitment to retire and detailed, realistic plans

Table 10.1 Typology of career bridge job

Career bridge jobs							
Immediate		Delayed		Intermittent			
Steady		Steady		Self-employed			
Self-employed	Other-employed	Self-employed	Other-employed	Self-employed	Other-employed	Self-employed	Other-employed
Same employer as in the career job	Different employer as in the career job	Same employer as in the career job	Different employer as in the career job	Same employer as in the career job	Different employer as in the career job	Same employer as in the career job	Different employer as in the career job

Table 10.2 Typology of non-career bridge job

Non-career bridge jobs				
Immediate		Delayed		
Steady		Intermittent		
Self-employed	Other-employed	Self-employed	Other-employed	Self-employed
Self-employed	Other-employed	Self-employed	Other-employed	Self-employed

Source: Adapted from Beehr and Bennett (2015, p. 140)

to complete the process successfully. The theoretical approaches that have proved most helpful in understanding this last phase of the retirement process are rational-economic and motivational-instrumental theories about individual behaviour (see Feldman and Beehr 2011, for a detailed analysis of these theories and their implications).

Based on the retirement model formulated by Wang and Shultz (2010), Zhan and Wang (2015) have recently proposed four theoretical conceptualisations of bridge employment comprising: (a) bridge employment as decision-making, (b) bridge employment as a career development stage, (c) bridge employment as an adjustment process, and (d) bridge employment as a part of HRM.

- (a) Bridge employment as decision-making refers to what Feldman (1994) considers is the usual experience of many workers when, some time in their mid-to-late career, they begin to address multiple retirement-related decisions. Older workers are faced with a complex decision-making process, which is influenced by multiple personal and contextual factors. A number of researchers (e.g. Gobeski and Beehr 2009; Zhan et al. 2013) have argued that while positive work attitudes are positively related with bridge employment decisions, the strength of such associations may be affected by perceptions of financial problems, poor health, and labour market constraints (for instance, a high unemployment rate) affecting the individual's ability to find a suitable bridge job. These contextual factors can play an important role as boundary conditions in the decision-making process, weakening the predictive effects of work attitudes (Zhan and Wang 2015).
- (b) Conceptualisation of bridge employment as a career development stage means treating the phenomenon as a professional step taken after retirement (Shultz 2003). Where the conventional model assumed that retirement marked the end of a person's professional career and normally their final withdrawal from the labour force, bridge employment may represent a phase of enhanced flexibility in working hours, work content, relations with the employer, and professional activity in order to continue in paid work, on the one hand, or an opportunity to embark upon a period of self-employment and entrepreneurship, on the other, whether in the same profession as the individual's original career job or in some other field (Alcover et al. 2014b). Furthermore, it is likely that people above the age of 60 who are strongly driven by achievement and Independence will actually commit more strongly to self-employment options than to wage-and-salary bridge jobs (Kerr and Armstrong-Stassen 2011). An important

question here is whether transitions into bridge jobs are motivated by a personal need or desire simply to move into retirement, or are driven by aspirations and goals for continuing career progression (Parry and Bown Wilson 2014). The quality of working life may hold the key to views about the nature of bridge employment and whether or not it is accepted as a career transition. The degree to which different individuals identify with their careers or believe in the centrality of work (Zhan and Wang 2015) is significant to their desire to continue developing either in their career occupation or through a bridge job in a new career (Parry and Bown Wilson 2014). Thus, Gobeski and Beehr (2009) found that workers with a high level of career attachment predominantly chose career bridge employment over full retirement or non-career bridge employment.

- (c) Bridge employment as an adjustment process. Given that bridge employment is broadly conceptualised as labour force participation connecting an individual's career employment and complete work withdrawal or full retirement (Shultz 2003), many studies have viewed bridge employment as an adjustment process and have then gone on to examine its impacts on retirees' satisfaction with retirement, physical and mental health, and psychological well-being (Zhan et al. 2009). According to this general conceptualisation, older workers may use bridge employment as a coping mechanism to adjust to retirement (Zhan and Wang 2015). In this light, it is more likely that older workers will show a preference for bridge jobs which offer shorter working hours, lower work demands, and therefore, some reduction in the tensions and stress associated with work, and for jobs which allow them to spend time on leisure, family, or social activities, thereby facilitating adjustment to retirement (Alcover et al. 2014b). In this regard, the postulates of continuity theory (Atchley 1989) will also be important insofar as older workers will predominantly prefer bridge employment in the same occupation as their career job, easing the adjustment to retirement and avoiding any sharp break in the individual's self-image and identity (Kim and Feldman 2000). Beehr and Bennett (2015) argue that bridge employment performs the latent function of providing an identity, which the retiree may like either more or less than the former identity based on his/her career job. This is consistent with continuity theory and with bridge employment as a process of adjustment to retirement.
- (d) Bridge employment as a part of HRM. Finally, conceptualising bridge employment as a part of HRM emphasises the utility of bridge employment from the employer's perspective (Zhan and Wang 2015). In the

context of an inexorably ageing workforce, bridge employment allows organisations to retain valuable skills and the organisational experience of older workers at a reduced cost (Adams and Rau 2004), where immediate replacement by younger workers is not always an easy or smooth process (Alcover et al. 2014b). This is because older workers possess a considerable store of professional experience and expertise, social capital, and implicit knowledge, and they are very often ready to continue making valuable contributions to their organisations (Wang and Zhan 2012). Where organisations are able to offer attractive conditions (Rau and Adams 2005) and create specific motivational systems (Claes and Heymans 2008), bridge employment can contribute significantly to the retention of a knowledgeable older workforce, instead of relying on contingent workers or the return of retirees.

Antecedents and Consequences of Bridge Employment

After several decades of shrinking participation by older workers in the labour force and emphasis on early retirement both by organisations and the majority of employees, the trend finally went into reverse in the mid-1980s (Quinn 2010; Wang & Shultz, 2010). Indeed, it would appear that not even the financial crisis and ensuing recession, which began in 2007, affecting Europe and the USA in particular, caused this trend to slow down (Cahill et al. 2013b). A number of societal and organisational changes have impacted the nature of work and availability of bridge jobs (Beehr and Bennett 2015). To begin with, medical advances and improvements in basic living standards have allowed ever more people to live longer while still enjoying good health. This has meant that increasing numbers of people now approach old age actively, and in general, they want to prolong their working lives beyond the traditional retirement age, even if they do require enhanced health and safety measures, and health promotion policies (Crawford et al. 2010). Second, many of the structural changes to pensions systems and incentives were already driving the decision to work past the age of 65 (Quinn 2000), at least in many of the developed countries (Peiró et al. 2013). Third, differences between generational groups have left organisations concerned about losing much of their most skilled and experienced workforce because the baby boomers (that is, those born approximately between 1946 and 1964) (Hatcher 2003) were far more numerous than the Generation X group, which does not have enough people to fill critical talent gaps in key jobs and leadership positions (Beehr

and Bennett 2015). Furthermore, the very nature of work itself has changed in many contexts as a result of advances in technology, which have enabled organisations to transfer many traditional desk-based jobs to virtual jobs or tele-working (Beehr and Bennett 2015), an arrangement that may be better able to accommodate an older workforce, disabled people, or those interested in flexible work schedules (Patrickson 2002). Finally, the quality of bridge jobs has improved in recent years, making them more attractive to older workers and those who have already retired but opt to re-enter the labour market (Topa et al. 2014). For all of these reasons, bridge employment has become increasingly the protagonist of research into the mid- and late career stages and eventual retirement.

Most research in the area of bridge employment to date has focused on its antecedents or predictors (Beehr and Bennett 2015), following the tradition of research on retirement and early retirement. As Wang and Shultz (2010) note, early research on bridge employment was primarily concerned with demographics and socio-economic variables (e.g. Doeringer 1990; Quinn 2000). As this research evolved over the last two decades, however, studies began progressively to examine antecedents by viewing bridge employment as an informed decision-making process (Wang & Shultz, 2010).

Beehr and Bennett (2007) outlined the nature of variables affecting older workers as they begin the transition to retirement, identifying three categories or levels of predictors: (a) variables that come from the individual, such as health, (b) variables that depend on the job or organisation, such as compensation, and (c) societal influences such as economic factors, perhaps the area that has attracted the most attention because it includes incentives and pension plans, health insurance, and perceived and objective wealth (Cahill et al., 2013a; Topa et al. 2011).

In a closely parallel outline, Szinovacz (2003), Wang et al. (2009), and Wang and Shultz (2010) categorised the predictors of the decision to retire as: (a) micro-level personal factors, such as age, education, health, personality, cognitions about bridge employment, financial status, and individual motives to engage in bridge employment, including both career and personal factors, (b) meso-level work-related factors, such as work environment and organisational factors (work role, satisfaction, commitment, career options and career possibilities), and family, and (c) macro-level factors such as organisational-level policies, societal norms, the state of the local labour market and the regional economy, and cultural norms directly influencing the retirement decision-making process (Wang et al. 2014). Extensive research (e.g. Adams and Rau 2004; Kim and Feldman 2000; Gobeski and Beehr 2009; Wang et al. 2008) has shown that all of these antecedents influence older workers'

decision-making with regard to bridge employment and the prolongation of working life.

In short, a synthesis of previous research (Alcover et al. 2014a) shows that acceptance of bridge employment depends on numerous factors, including the perception of good health, age in the late 50s and early 60s, length of service to the employer, high job satisfaction, organisational and/or career commitment, the perception of being in possession of a high level of career competences and skills, the flexibility of working arrangements, a significant entrepreneurial bent, family background including a working partner and children or other dependents, the need to maintain a certain level of income beyond retirement age or make the requisite contributions to receive a later retirement pension, absence of defined benefits compensation and pension systems, economic perceived stress, and the wish to reduce the stress and workload inherent in a full-time job (see, for instance, Beehr and Bennett 2007; Davis 2003; Feldman 2007; Kim and Feldman 2000; Lim and Feldman 2003; Shacklock and Brunetto 2011; Šimová 2010; von Bonsdorff et al. 2009; Zhan et al. 2013). In addition, Wang and Shi (2014) note that many financial factors could motivate an older worker to seek further work after retirement via bridge employment, such as an increasing age to qualify for social security benefits, a decline of traditionally defined benefit plans in favour of defined contribution plans, and improved labour market earnings (Cahill et al. 2013b).

As Beehr and Bennett (2015) note, there has been much investigation into individual-level predictors of bridge employment, but research on organisational-level predictors remains patchy, and societal-level predictor information is downright scarce. Researchers should consider a multilevel framework more often to examine the multiple antecedents of bridge employment simultaneously, so that we can begin to examine the complex interplay between factors. Furthermore, much of the evidence obtained from the good deal of research carried out at the individual-level concerns basic characteristics (e.g. health or education) and demographics (e.g. age and gender), while other individual differences such as personality traits affecting bridge employment decisions still need to be explored, following the work already done in relation to retirement decisions in general (Wang et al. 2014). At the organisational level, meanwhile, there is much researchers could do to help guide efforts to recruit and retain older workers by examining the impact of different human resources policies and programmes in terms of attracting and encouraging those approaching retirement age (Beehr and Bennett 2015). In this sense, the decision to prolong working life may be further encouraged by interventions and programmes aimed at ameliorating working conditions,

particularly promoting greater opportunities to aged workers with respect to involvement in new organisational forms, training, and learning new things at work (Villoso et al. 2008), and improving organisational perceptions and attitudes to older workers and retirement (Zappalà, Depolo, Fraccaroli, Gugliemi & Sarchielli, 2008). However, other data indicate that the decision to forego the potential benefits of extending working life gains ground when delayed retirement is perceived as being too long, and the health or enjoyment advantages of retiring earlier are perceived as greater (Bidewell et al. 2006). In this regard, the concept of retirement unquestionably means many different things to different people (Sargent et al. 2011; Wang 2007), and older workers face an increasingly diverse range of experiences.

Finally, while prior research has covered many of the antecedents or predictors affecting the bridge employment decision, there are many other factors which may serve as moderators of the predictor-bridge employment decision relationship but have so far received little attention in the literature including, for instance, gender and care needs or eldercare of employees' parents. This may be due simply to the fact that research on bridge employment is still in its infancy, but as we come to understand some of the salient predictors, we will need to examine whether certain predictors are more important for some groups rather than others (Beehr and Bennett 2015). Future research should also endeavour to deepen the identification of predictors of the various types of bridge employment, as indicated in Tables 10.1 and 10.2. A number of studies have already explored some of these predictors in relation to bridge employment preferences. For instance, Wang et al. (2008) found that (a) older workers who had better physical health and experienced less psychological stress were more likely to engage in career bridge employment than to take full retirement; (b) older workers who had better physical health and financial circumstances were more likely to engage in non-career bridge employment than to take full retirement; and (c) older workers who had better financial circumstances and experienced less psychological stress were more likely to engage in career bridge employment than in non-career bridge employment (Wang and Shi 2014).

Regarding outcomes or consequences of bridge employment, the use of these strategies and alternatives in different countries worldwide over the last two decades has generated important benefits for both individuals and organisations (Alcover et al. 2014b). The main benefits are related to increased health and general well-being, including improvements in the quality of psychosocial life and life satisfaction in the period before and after retirement (Cahill et al. 2013a; Kim and Feldman 2000); enhanced job-related well-being and health as a result of the reduction in stress and workload resulting

from a switch from full-time working to a job with shorter hours and less responsibility (Bennett et al. 2005); better health status for those who transitioned to bridge employment than for those who did not, even after controlling for pre-retirement health status (Wang et al. 2009); reduction of serious illness and functional limitations, and improvements in the mental health of older workers (Jex et al. 2007; Zhan et al. 2009).

Additional benefits of bridge employment can be identified as related to working conditions and organisational status of older workers: for example, decreases in the experience of age discrimination among older workers, as a result of flexible working arrangements made between them and organisations to the benefit of both parties (Beehr and Bowling 2002; Feldman 2007; Schalk 2010); and the development of flexible working arrangements which allow organisations to retain (and even attract) experienced, skilled workers who have reached the retirement age (Greller and Stroh 2003; Rau and Adams 2005). Other positive consequences for bridge employment have been highlighted, such as enhanced autonomy, financial security, and well-being in the period after retirement (Munnell and Sass 2008; Topa et al. 2011), especially when the retiree has dependent family members (Kim and Feldman 2000). Lastly, while general evidence for the effects of gradual retirement on productivity remains scarce, qualitative data suggest that older workers who remain in the labour force are typically well-motivated, highly skilled, and productive (Kantarci and van Soest 2008).

A further benefit of bridge employment is to keep older workers belonging to the baby boom generation active and productive in the labour force, thereby preventing negative outcomes and dysfunctions in terms of social security contributions and the risks for benefits systems that could arise in the event of mass retirement of large numbers of workers in a very short period (Alley and Crimmins 2007; Pongcharoen and Schultz 2010; Wang et al. 2008). Furthermore, bridge employment has the advantage at the beginning of the retirement transition process of ensuring the continuity of lifestyles and patterns (i.e. the balance between work, family life, and leisure), preventing the sharp breaks and changes typical of conventional retirement and underpinning positive psychological outcomes associated with personal and social identity, perceptions of personal realisation, role performance, entrepreneurial behaviours, and so on (Wang & Shultz, 2010). These considerations have been accompanied in recent years by an increasing tendency for organisations to treat bridge employment as an important facet of human resources policy designed specifically for workers above the age of 50 years (Rau and Adams 2005). In this regard, future research will be enormously important to facilitate the development by organisations of more effective recruitment strategies

and practices designed to attract retired workers to bridge employment jobs through flexible, contingent arrangements that suit both parties, to the benefit of society as a whole (Beehr and Bennett 2015; Wang & Shultz, 2010).

Workers' expectations and ability to plan ahead and decide the terms of their continued participation in work–life are of enormous importance to the expansion and generalisation of gradual transitions between working life and full retirement. In this light, the existence of institutional, structural, and legal restrictions and obstacles may have a significant inhibiting effect on bridge employment experiences in different countries (Raymo et al. 2010), with the consequent loss of potential benefits for workers, organisations, and society in general.

Beehr and Bennett (2015) make a number of inferences about the manifest and latent functions of employment. For example, bridge employment performs the latent function of providing a positive identity for the older worker. Also, the social groups that a retiree is part of in a bridge job provide the social contact function of work, and the latent function of structuring time is clearly provided by bridge employment insofar as any job, bridge or otherwise, requires the use of time. Finally, outcomes of bridge employment like maintaining finances and providing economic security are manifest functions of work.

Conclusions about outcomes and benefits targeted by the different forms of bridge employment identified in eight European countries (Belgium, Germany, Italy, Poland, Spain, Sweden, The Netherlands, and UK), USA, Canada, Australia, and Japan may be summarised as follows (Alcover et al. 2014b):

1. To address population ageing and the need to extend active life in line with the increase in actual life expectancy.
2. To underpin the viability of pension and social benefits systems.
3. To maintain the quality of life, health, and welfare of older people before, during, and after retirement processes.
4. To retain highly skilled workers in organisations and benefit from the implicit knowledge they possess.
5. To ensure the transmission of knowledge and intergenerational relations and succession.
6. To balance life cycle stages through phases combining different degrees of productive activity in line with the nature of work and early twenty-first-century society.

As may be observed, the objectives identified emerge at different levels of analysis—a fact which suggests an initial direction for future research.

Investigation of the predictors, effects, and consequences of bridge employment must take a multi-level and interdisciplinary approach, allowing integration of the diversity of variables and processes involved in the manner indicated by scholars researching the retirement planning, retirement transition, and retirement adjustment frameworks (e.g. Adams and Rau 2011; Beehr and Bennett 2007; Noone et al. 2013; Topa and Alcover 2015; Wang 2007; Wang & Shultz 2010).

However, extended work later in life is not good news or a free choice for everyone. While continued work and bridge jobs can, in general, provide a more secure retirement in financial terms, as well as personal and psychosocial benefits for many older workers, for others, especially those at the lower end of the socio-economic spectrum or who lack skills, additional work may impose significant hardship (Cahill et al. 2013a). The benefits of bridge employment will, then, depend to a great extent on perceptions of freedom of choice and the voluntary nature of the transition to full retirement. As research into both early retirement and retirement in general has shown (e.g. Alcover et al. 2012; Topa et al. 2009; Van Solinge and Henkens 2008; Wang et al. 2011), these are crucial factors to obtain positive outcomes from the experience.

Meanwhile, the available data do not so far allow any precise evaluation of the extent to which goals have been achieved, and time-series data and longitudinal studies are needed to assess the medium- and long-term effects of bridge employment at the different levels of analysis, and to relate outcomes with the background to and predictors of workers' actual decisions (Alcover et al. 2014b).

A New Look at Bridge Employment: Bridge Workers as Job Crafters

Let us postulate that bridge employment, like any other work, can be seen as a job, a career, or a calling, following the taxonomy of work and motivational orientations proposed by Wrzesniewski et al. (1997). Individuals with a *bridge job* mentality will focus on economic rewards or extrinsic motives for working, rather than self-expression, pleasure, or fulfilment, but those with a *bridge career* mindset will focus on advancement, promotion, and professional growth, despite their advanced age. Finally, individuals with a *bridge calling* mindset will focus on enjoyment, self-expression, and fulfilment, and potentially on socially useful work. Research has shown that employees in a wide range of occupations perceive their work primarily in one of these three

ways (Rosso et al. 2010; Wrzesniewski et al. 2013). We believe this taxonomy can be also applied in the case of bridge employment.

By definition, bridge employment embraces a range of job possibilities, and in some ways, it therefore provides opportunities to redefine the content of work, its meaning and its scope, as well as the associated interpersonal and social relations it engenders, among other aspects. Because of this, taking a bridge job may influence the identity of older workers, their capacity to take the initiative and innovate, and their psychological capital (PsyCap). Working in a different field from the career job, embarking on an entrepreneurial activity, gaining the flexibility to change one's occupational path at any time or, where the bridge job is in the same field as an individual's former career job, the chance to work under less stressful or demanding conditions are all opportunities to change perceptions of work and of the sources of fulfilment it offers. In short, bridge employment can allow the "reinvention" of an older worker's own job and identity, changing their meaning, and the psychological functions they perform.

As Beehr (2014) has recently pointed out, the latent (psychological) functions of employment (in retirement) still remain partly unexplored and are not well understood (see also Beehr and Bennett 2015). In this light, we believe it would be very interesting and not a little helpful in terms of filling this gap to take a fresh look at bridge employment by conceptualising bridge workers as "job crafters", which is to say, as senior job designers and the possessors of a wealth of experience and positive coping strategies applicable to the late career stage (Alcover *in press*). Recent research suggests that job crafting may enhance the well-being of older employees (Tims et al. 2013; Truxillo et al. 2012). However, the possibilities of job crafting in relation to bridge employment have not yet been explored in depth. Let us, then, present the main outlines of this proposal.

Overall, job design consists of the functions, tasks requirements, and relationships assigned to one person in an organisation (Ilgen and Hollenbeck 1991). Although job design has traditionally been associated with political and organisational decisions (Vough and Parker 2008), it has also been observed that workers can individually make changes, improvements, and innovations in their work processes and in their relationships at work. It is precisely this dynamic and proactive activity that the concept of "job crafting" (Berg et al. 2013) seeks to reflect. Job crafting is defined "as the physical and cognitive changes individuals make in the task or relational boundaries of their work" (Wrzesniewski and Dutton 2001: 179). More specifically, the concept refers to the process by which employees redefine and reimagine their job designs in personally meaningful ways, proactively reshaping the task

and the relational and cognitive boundaries of their jobs. Thus, job crafting implies an intended action, and those who undertake it are considered “job crafters” (Wrzesniewski and Dutton 2001).

Researchers have postulated that job crafters proactively reshape the boundaries of their jobs applying three categories of task, relational, and cognitive techniques (Berg et al. 2013). In task crafting, employees modify the set of responsibilities prescribed by formal job requirements, by adding or dropping tasks, altering their nature, or changing the distribution of time, energy, and attention allocated to different tasks. Relational crafting involves changing how, when, or with whom employees interact while performing their tasks, whether inside or outside the organisation. Finally, cognitive crafting changes the way employees perceive their tasks (e.g. as a set of discrete parts or as an integrated whole) and the relationships that make up their jobs. By changing “... any one of these elements, an individual alters the design of the job and the social environment in which he or she works” (Wrzesniewski and Dutton 2001: 180). Job crafting is not a discrete, isolated, or one-time event (Berg et al. 2013). Rather, it can be seen as a continuous process, as a behaviour pattern that affects both the meaning of the work and the individual’s work identity (Wrzesniewski and Dutton 2001). It has been suggested that job crafting is likely to be influenced by the position reached by employees in their career trajectories (Fried et al. 2007) and the social context in which they do their work (Berg, Wrzesniewski & Dutton, 2010). A core feature of job crafting is that it is a psychological, social, and physical act involving a creative and improvised process, thereby motivating crafters to adapt their jobs and reinterpret or create a new significance and meaning for their work. The construct also emphasises that employees initiate and make changes to their jobs for themselves from the bottom up, rather than supervisors or managers designing and directing changes from the top down, as is usual in the conventional job redesign measures implemented in organisations (Berg et al. 2013).

The model of job crafting proposed by Wrzesniewski and Dutton (2001) postulates that job crafting activities depend, first, on motivation for job crafting, which arises from three psychological needs: first, need for personal control over job and work meaning in order to avoid the experience of alienation from work; second, need to create a positive self-image in their work, drive for self-enhancement in their own eyes and in the eyes of others; and third, need for human connection with others, as a way to introduce and extend meaning in their lives. And third, job crafting depends on two moderating variables: perceived opportunity for job crafting and individual or motivational orientation towards work. “*Perceived opportunity to craft a job refers to the sense*

of freedom or discretion employees have in what they do in their job and how they do it” (Wrzesniewski and Dutton 2001: 183), and obviously it depends on job features like task interdependence and monitoring or supervision by management. Finally, individual or motivational orientation towards work refers to seeing employment as a job, a career, or a calling, following the taxonomy on work and motivational orientations proposed by Wrzesniewski et al. (1997) mentioned above.

In common with workers of any age or at any stage of their careers (e.g. Heslin 2005; Wrzesniewski 2003), older people in a wide range of work contexts do not look for paid work after retirement with the sole aim of satisfying financial and other extrinsic needs, but they may also be motivated to seek a calling, a meaningful job that provides purpose, self-expression, fulfilment of core personal values, and a feeling of usefulness to society. Berg, Grant, and Johnson (2010) define calling broadly as “an occupation that an individual (1) feels drawn to pursue, (2) expects to be intrinsically enjoyable and meaningful, and (3) sees as a central part of his or her identity” (p. 973).

Hence, we postulate that bridge jobs can also be seen as a sort of late calling, whether actively pursued or unexpected, which is intended to complete or to redefine the individual’s own career (Alcover *in press*). From this standpoint, we may view bridge jobs as an opportunity for older workers to satisfy a calling, whether it is one that was once set aside to satisfy the demands of the career job, one that has developed in the mid- and later career stages, or one that the individual discovers on considering retirement from his or her career job upon finding unexpected new opportunities that were never explored in the course of his/her former career. In this way, a bridge job can be conceptualised as a calling in the sense of “meaningful work”, which is to say, work that the older individual holds to be significant and to serve a useful purpose (Pratt and Ashforth 2003). Rosso et al. (2010) propose the term “meaningfulness” to capture the amount or degree of significance employees believe their work possesses, and we postulate, in turn, that this idea could be usefully applied to measure bridge jobs in terms of meaningful work.

Previous research has highlighted that job crafting, meaningful work, and experiencing work as a calling is associated with numerous work-related benefits, including increased job satisfaction, motivation, work engagement, and performance (Grant 2007; Petrou et al. 2012; Rosso et al. 2010), and with psychological benefits, including strong emotions about work-related activities, psychological well-being, and increased health and life (Hall and Chandler 2005, Heslin 2005, Wrzesniewski et al. 1997). In sum, the most influential scholars in work design and redesign fields (e.g. Grant and Parker 2009; Morgeson et al. 2012; Oldham and Hackman 2010) acknowledge

job crafting and meaningful work domains as valuable and promising new approaches to organisational behaviour.

Our aim in considering bridge workers as job crafters who are actively engaged in meaningful work, and potentially, in satisfying a late calling, is to explore in more detail the psychological processes underlying decisions to go on working after retiring. Aside from doing paid work basically for financial reasons, bridge workers can also be seen as active seekers of self-expression, work involvement, work engagement, and job satisfaction. Thus, work activity in retirement is not merely a substitute for the career job, or an “attenuated job” akin to occupational therapy, but rather a lush, meaningful occupation that is in every way equal to any job held in the earlier stages of the individual’s career. This proactive psychological perspective substantially changes and enriches the concept of retirement so that it is no longer primarily an “essentially negative notion of attempting to define what people are *not* doing” (Denton and Spencer 2009: 74, original emphasis), or a stage of life that is marked by the absence of a “proper” job (McVittie and Goodall 2012). In short, we believe that this new look at bridge employment (Alcover *in press*) has the potential to improve our understanding of the psychological mechanisms involved in post-retirement work, and to integrate recent research on job crafting, meaningful work and calling with research carried out in the field of the mid- and late career stages and bridge employment.

Conclusions

Though the phenomenon has not yet spread universally, retirement has become a process for an increasing number of older workers rather than a single before-and-after event (Cahill et al. 2013b). Many career workers now exit the workforce gradually, sometimes by reducing the hours worked in their current job, but much more often by switching to a new bridge job after career employment, either in the same organisation or in a different one, in the same profession or in a new occupation, as a wage earner or as a self-employed professional or entrepreneur. Retirement, then, is not a discrete event but rather represents a longitudinal developmental process through which workers tend to disengage and reduce their psychological attachment to work and behaviourally withdraw from the workforce (Wang 2013; Wang et al. 2011). Above the age of 50, both men and women face a series of work-related, family, personal, financial, and leisure events that condition their decisions to stay in the labour market and to seek alternatives to the conventional full-time job in order to prolong their activity beyond normal or mandatory retirement age (Alcover et al. 2014a).

However, continued work later in life is not a panacea when it comes to shortfalls in retirement income (Cahill et al. 2013b). For many people, and especially those in poor health, those whose skills are obsolete, the partially disabled, those who have worked long years in physically demanding jobs or in highly stressful organisational contexts, and victims of lay-offs and redundancies in slack labour markets, continued work may not be a realistic (or indeed a palatable) option. As argued above, involuntary engagement in bridge employment may result not only in scarce benefits for older workers but may actually produce negative effects such as job dissatisfaction, health risks, or poor and ineffective performance. Even if older workers wish to keep working, then, the question remains whether there will be enough appropriate jobs to go round (Cahill et al. 2013b). Organisational managers and policymakers need to keep these issues in mind when considering and promoting policies to encourage work in later life in order to ensure that bridge employment offers older workers real opportunities and realistic options, and to avoid the frustration that comes from exaggerated expectations.

In this sense, we must not forget that labour markets in many countries are still far from “bridge-job-for-all” conditions. For instance, a recent comparative analysis of constrained retirement in 24 European countries (Ebbinghaus and Radl 2015) emphasises the prevalence of involuntary job retirement and constraints on the continuation of work among older people. While the pull perspective conceives early retirement as voluntary, since rational actors prefer leisure over work, the push perspective points to external constraints, such as disability, the targeting of older workers for lay-offs and redundancy, unemployment rates, statutory pension ages, and pension generosity, defining exits from work under such conditions as involuntary. The study thus presents new evidence on the prevalence of constrained retirement across Europe. For about one-third of retirees, constraints on individual retirement decisions could be identified, leaving little doubt that this is a social problem deserving the attention of both academics and policymakers. This is especially important because such factors could increase the inequality of older people in a variety of ways. As Therborn (2012) argues, inequality may be vital, existential, or resource-related. If older workers are forced to retire at an early age and not always under ideal conditions, and if they also lack opportunities to continue their working lives via bridge employment, they may find themselves exposed to financial difficulties, worsening physical and mental health, impaired psychological well-being, and other similar risks, intensifying the inequality suffered by an ever larger segment of the population. Meanwhile, if population ageing continues in line with the trends indicated at the beginning of this chapter,

the risk of rising inequality will only increase in the coming decades, jeopardising the well-being, health, and survival of older people.

Research over the past decade has been carried out in a wide range of very different geographical, employment, and socio-economic contexts, a fact which allows us to identify certain gaps in our understanding of the bridge employment phenomenon. As Beehr and Bennett (2015) note, some countries have a great deal of bridge employment compared to others. In many countries, retirement remains a fairly abrupt event which does not much resemble the gradual process described in this chapter. Some countries have traditionally had employment systems that help people find bridge jobs, including, to varying degrees, the USA (Pongcharoen and Schultz 2010), the Netherlands (Henkens and Van Solinge 2014), Australia (Taylor et al. 2014), and Japan (Usui et al. 2014). Elsewhere, however, inflexible labour legislation, cultural norms, mandatory retirement ages, and government pension regulations make it very hard for anyone to retire and then take another job, for example, because an otherwise good pension might be reduced or even lost entirely, or because it is not permitted to work, and at the same time, draw a partial pension. This is the case, to varying degrees, in Poland (Zientara 2014), Italy (Depolo and Fraccaroli 2014), and Spain (Alcover and Topa 2014). As a consequence, a bridge employment model that is common in one country may be rare or non-existent in another, even where it is relatively successful (Beehr and Bennett 2015).

The practical implications of bridge employment may be summarised as follows (Alcover et al. 2014b).

- Bridge employment in all its different forms facilitates the implementation of policies and practices designed to foster active ageing, eventually enhancing quality of life among the elderly, as well as perceived and general health (Ilmarinen 2006).
- Bridge employment policies help people over the age of 55 to remain in full- or part-time work beyond the usual or statutory retirement age, which may be enhanced by the introduction of permanent benefit reductions for early retirees.
- Bridge employment alternatives can allow workers and organisations to negotiate flexible, individual formulae to suit the personal characteristics of each employee with a view to the continuation of working life. Although it has not been conclusively shown that work, partial and full retirement, and health are positively related, it would seem that a good fit between working conditions, individual traits, the level of activities, and the continuation of

working life may be beneficial for the general health and well-being of older people.

- A relevant practical implication of bridge employment is its facilitating role in the retention of the most experienced human capital, consisting of people with extensive implicit knowledge and highly developed skills and abilities, whose immediate replacement by a younger worker is not always an easy or smooth process.
- The continuation of older people in work may underpin the intergenerational handover, facilitating processes of socialisation, education, and training among the young, not to mention succession processes affecting top management posts discharged by senior employees.
- Bridge employment can also help align people's life-cycle traits with the context and conditions of life today. This is a key practical implication, replacing the model of clearly defined, compartmentalised "stages" or "periods" by a new model which favours the ideas of "process" and "transition" through the life experience of each individual based on changes in the conditions of his or her life (Shultz and Wang 2011). In our opinion, it is necessary to rebalance the stages of active employment and retirement on a more realistic basis, given the significant, and ongoing, increase in the life expectancy of people in the majority of developed and developing countries, especially if the aim is to ensure that elderly people are able to maintain similar living standards to those which they enjoyed in the course of their professional lives.
- One last practical implication concerns the opportunities for self-employment which bridge employment may offer. Self-employment offers real psychosocial advantages which are very much valued by older workers, such as independence and flexible working hours. Furthermore, it is likely that people above the age of 60 who are strongly driven by achievement and independence will actually commit more strongly to self-employment options than to wage-and-salary bridge jobs (Kerr and Armstrong-Stassen 2011). These options have positive consequences for political leaders, as they allow older workers to continue earning and paying social security dues and taxes, and they are also becoming increasingly attractive to employers who will need to fill an expected shortfall in skilled workers (Giandrea et al. 2008). In short, the versatility of bridge employment in practice seems beyond doubt.

Finally, we have sought in this chapter, to present a preliminary conceptualisation of bridge workers as "job crafters" or senior job designers, and the possessors of long experience and a wide range of positive coping strategies

for the late career stages (Alcover [in press](#)). We assume that older people in a wide range of work contexts do not only look for paid work after retirement to satisfy financial and extrinsic needs, but that they may also be motivated to seek a calling in terms of a meaningful job that offers purpose, self-expression, fulfilment of core personal values, and a feeling of staying useful to society. As explained above, our aim in considering bridge workers as job crafters who are actively engaged in meaningful work and, potentially, in satisfying a late calling, is to explore in more detail the psychological processes underlying decisions to go on working after retiring. Aside from doing paid work basically for financial reasons, bridge workers can also be seen as active seekers after self-expression, work involvement, work engagement, and job satisfaction. In making this proposal, we hope to take the exploration of bridge employment a step further from psychological and psychosocial standpoint, seeking to drive the formulation of models based on multiple variables designed to address the issues involved in bridge employment from an integrated perspective (Beehr and Bennett [2015](#)). We believe that a better understanding of the factors influencing planning, decision-making, adjustment, and the outcomes of bridge employment will improve the strategies and policies deployed by individuals, organisations, and politicians. In turn, this will result in numerous benefits not only for older workers and organisations, but for society as a whole.

Some suggestions about future research directions are summarised at the end of this chapter.

The model of bridge employment does not constitute a single solution or a global framework, transportable to any national context. Dealing with population ageing is a general challenge around the world, but many, although not all, work-related and demographic phenomena are similar across countries (Beehr and Bennett [2015](#)). Thus, any solutions need to be analysed from a local perspective, as the proposed forms of bridge employment and extended working life must fit the immediate context (Alcover et al. [2014b](#)). The model of bridge employment that exists in one country may not be seen very often in another country, and this situation requires greater research in the coming years. These aspects also lead to the need for research on the prevalence of bridge employment change over time and the degree to which the trends for specific types of bridge employment differ (Beehr and Bennett [2015](#)).

In addition, future research needs to go deeper into the background and predictors of different forms of bridge employment, considering and examining the factors involved at different analytic levels (Gobeski and Beehr [2009](#)). As Beehr and Bennett ([2015](#)) have recently argued, future research should address what variables predict employees' decisions to take bridge employment

versus continuing in a career job and/or full retirement, for specific types of bridge employment such as in career/non-career jobs, entering immediate/delayed bridge jobs, working in bridge jobs steadily/intermittently, and bridge jobs in which one is self-/other-employed, and so on. Researchers could formulate specific explanatory models and theories, contributing in this way to our understanding of what are highly complex processes (Zhan et al. 2013) involving numerous variables producing multiple interactive and iterative effects (Alcover et al. 2014b). The discussion and conclusions about bridge employment and modalities to prolong working life stresses the need for deeper understanding of work as one contributor to overall quality of life (Winkelmann-Gleed 2012). These are topics in need of research.

Finally, future research should also address how organisations can create job designs and organisational policies that will encourage senior employees to remain in their career jobs or take a bridge job with the same employer rather than retire fully or to choose a self-employment alternative (Beehr and Bennett 2015). This involves promoting good practice in age management and positive attitudes towards older workers, avoiding negative age stereotypes and ageism. An interesting research area is related to age meta-stereotypes (e.g. what older workers think that younger colleagues think about them) (Finkelstein et al. 2013), examining the effects of workplace age meta-stereotypes on workplace outcomes such as older workers' attitudes, health, and well-being. These good policies and practices in age management must be encouraged both in large organisations, as well as in small and medium-sized enterprises (Fuertes et al. 2013). Furthermore, future research should also address how organisations can attract and be challenging for older workers seeking bridge employment in another organisation or another non-career job. This is also applicable to those who wish to re-enter the labour market after a withdrawal period (Rau and Adams 2005).

In this sense, Truxillo et al. (2015) have recently proposed a framework for workplace age intervention to support older workers, ranging several categories: selection, optimisation, and compensation training programmes, work redesign, increasing positive relations between age groups (intergenerational relationships), age-supportive human resources practices, work-life supportive policies, training practices for older workers, training for leaders/supervisors to support worker safety and health, ergonomic interventions, health promotion, and helping workers throughout their life span. According to Truxillo et al. (2015), future attention and efforts in these major categories should be addressed to advance research on interventions.

These research scenarios on bridge employment and extending working life are truly exciting, and we encourage researchers in these fields to share their

knowledge and experiences, as well as to collaborate in cross-national and cross-disciplinary research teams in pursuit of relevant advances in theory and practice.

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11

Understanding Retirement Processes: The Role of Life Histories

Marleen Damman

Introduction

In most developed countries, populations are aging rapidly due to long-term declines of fertility and increasing longevity (Wheaton and Crimmins 2012). These demographic developments have important implications for public finances, pension systems, labor markets, and organizations. Extending the working lives of older individuals is often perceived as a key policy response to population aging (OECD 2006), putting the issue of retirement high on the policy agenda as well as the scientific agenda. In this respect, insights are needed into factors that inhibit or rather stimulate the continuation of work careers, and keep workers engaged and motivated during late careers. Moreover, in the coming decades, numerous older workers will transition into retirement, which raises questions about how individuals experience their retirement and about factors that predict successful adjustment to retirement.

Research on retirement is a broad and interdisciplinary field of study. Demographers, economists, gerontologists, psychologists, and sociologists are among the scholars interested in questions related to retirement. There is no general agreement on the definition and measurement of retirement: it can

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refer to (partially) leaving the labor force during late careers, receipt of pension income, self-assessment by respondents, or combinations of these and other indicators (Denton and Spencer 2009; Ekerdt 2010; Beehr and Bowling 2012). However, most researchers would agree that retirement “relates to withdrawal from the paid labour force”, as Denton and Spencer (2009: 64) point out in their review of retirement concepts and measurements. Whereas some studies move beyond the disciplinary borders, the aspects of retirement transitions studied and the types of predictors that are taken into account seem to vary between disciplines (Henkens 1998).

Demographic, economic, and sociological studies generally focus on explaining differences in retirement-related behaviors and states, such as labor participation during late careers, actual retirement timing, and differences in retirement savings or income. Studies on more subjective facets that precede or follow upon the act of retirement are often found in the literatures of organizational psychology and social gerontology. These studies largely focus on intentions and attitudes of individuals, such as their intentions regarding late-career work or retirement timing, and adjustment to retirement. In the scientific literature, retirement is often referred to as being a process, rather than a discrete one-time event. What is actually meant by the term ‘process’, however, varies considerably between studies and disciplines (see Text Box 1). The term has been used to indicate that retirement consists of several broad phases (e.g., preretirement planning, retirement decision-making, postretirement adjustment), but also to refer to more specific behavioral or attitudinal dynamics within or across these phases. In most empirical studies, however, researchers solely focus on one phase or aspect of the retirement transition, “cognizant that they are studying just one piece of the larger retirement puzzle” (Shultz and Wang 2011: 172).

Text Box 11.1 The process of retirement

Even though “the consensus is that retirement is not a single event but rather a process that older individuals go through over a period of years” (Shultz and Wang 2011, p.170), what is actually meant by the term ‘process’ varies considerably between studies and scientific disciplines. The term has been used to indicate that retirement consists of several broad phases (e.g., preretirement planning, retirement decision-making, postretirement adjustment), but also to refer to more specific behavioral or attitudinal dynamics within or across these phases.

- The term ‘retirement process’ has been used to refer to the different phases individuals are assumed to go through when making the transition from

work into retirement. From a 'temporal perspective' (Shultz and Wang 2011: 172), the retirement process is generally described as consisting of three main phases: preretirement preparation and planning for retirement, the retirement decision-making process, and postretirement adjustment to the changed life circumstances in retirement (Wang and Shultz 2010, Shultz and Wang 2011).

- The terminology 'process of retirement' has been used to refer to the retirement decision-making process, which might take place over a longer period of time. Beehr (1986) describes that "employees prefer to and then decide to retire before they actually do it, and this may take some time" (p. 46), which implies that retirement preferences are followed by retirement intentions, and consequently, by the act of retirement in the process of retirement. Szinovacz (1989) points at processes of negotiation and renegotiation between spouses before a retirement decision is reached.
- The term 'retirement planning process' has been used to refer to changes in retirement expectations over time (Wong and Hardy 2009), the term 'preretirement process' refers to changing attitudes when getting closer to retirement (Ekerdt and DeViney 1993; Damman et al. 2013a), and the term 'adjustment process' is often used to refer to changing attitudes after retirement (Wang 2007).
- The notion of retirement as a process has also been applied to indicate variation in employment pathways (i.e., sequences of states) during late careers. It refers, for example, to the notion that retirement is not necessarily an absorbing state, given that retirees can reenter employment via bridge jobs and can have 'blurred' exit pathways (Mutchler et al. 1997).

For explaining differences between individuals in terms of their retirement intentions, acts, and attitudes, a large variety of factors has been studied. In a recent review of the multidisciplinary retirement literature, Wang and Shultz (2010) have grouped the empirically studied predictors of retirement in four broad categories. Besides macro socio-economic factors (e.g., social security system, economic conditions), three groups of meso- and micro-level predictors of retirement are distinguished: individual attributes (e.g., age, health, financial resources), job and organizational factors (e.g., job characteristics, job attitudes), and family factors (e.g., marital status, dependent children, partner support). Also in terms of the types of predictors studied, disciplines seem to vary in their focus. For example, where sociologists are mostly interested in the role of socio-economic and socio-demographic differences (e.g., type of work) for explaining variation in retirement transitions, psychologists often focus on more subjective factors (e.g., perceived work challenge).

To acquire insights into variation in retirement-related decisions and experiences, research in these various disciplines has, to a large extent, focused on explanatory factors that are relatively close in time to the

retirement outcomes studied, such as the health, wealth, work, and family situation of older individuals. These precursors received attention in various recent extensive reviews of the literature on employee retirement (e.g., Schalk et al. 2010; Wang and Shultz 2010) and adjustment to retirement (e.g., Wang et al. 2011; Van Solinge 2012). In line with the popularity of the ‘life course perspective’ for understanding outcomes in the field of social gerontology however, studies have increasingly started to pay attention to the role of experiences earlier in the life course for understanding retirement transitions. The role of these earlier life experiences for explaining retirement-related decisions and experiences will be the main focus of the current chapter.

Relevance of Focusing on Life Histories and Retirement

The life course perspective proposes—among other things—that specific life phases cannot be understood thoroughly without information on the prior life course (Elder 1994). Individual development is assumed to be lifelong: the lived past will set the stage for later decisions and experiences (Settersten 2003). Studying the role of earlier life experiences has been fruitful for explaining various outcomes among older individuals. For example, for explaining differences in terms of the financial situation of older individuals (Fokkema and Van Solinge 2000; Fasang et al. 2012), health (Wahrendorf et al. 2013; Hank 2010), and well-being (Peters and Liefbroer 1997), information about life histories proved to be informative. The scientific literature regarding the role of earlier life experiences for explaining variation in retirement transitions is still rather fragmented, but has been growing rapidly in the last decade. This makes it relevant to review the theoretical approaches that have been taken, to describe the empirical findings, and to discuss potential directions for future research.

Improving our understanding of the relationships between experiences earlier in life and retirement is not only important from a scientific perspective, but is relevant from a societal perspective as well. First, in the policy-oriented literature, it is expected that experiences earlier in life are of importance for the retirement transitions of older workers. For example, mid-career measures directed at occupational health and safety, and opportunities for learning new skills or improving skills are anticipated to positively influence labor market participation as individuals age (OECD 2006). In this respect, the OECD (2006) mentions that “some policy interventions to encourage later retirement should, in fact, focus on workers at younger ages” (p.135). Studying the

life course embeddedness of retirement may therefore offer starting points for mid-life interventions or policy design by testing the underlying assumption that earlier life experiences continue to affect the lives of individuals even in their later years.

Second, improving our understanding of the relationships between earlier life experiences and retirement is relevant in light of the changes in life courses that have been observed during the twentieth century. The ‘standard life course’—where paid work was central in the lives of men, housework and care tasks were central in the lives of women, and couples stayed together until death did them part—seems to have become less evident, as has lifetime employment at a single employer. What consequences will these changes in individual life courses have for the retirement-related decisions and experiences of older individuals? When achieving a better understanding of how retirement transitions of current retirees are related to their experiences earlier in life, we may be better able to predict how changing life course experiences might shape the retirement experiences of future retirees (cf., Börsch-Supan et al. 2013).

This Chapter

The current chapter will review the scientific literature on the relationships between earlier life experiences and retirement of older individuals. The next paragraph will describe important changes in individual life courses during the last decades, specifically focusing on experiences in the spheres of work and family. Thereafter, attention will be paid to the theoretical starting points in the research on life histories and retirement, followed by an overview of empirical findings. The last paragraph will conclude and will discuss the findings of the review. Generally, the aims of this chapter are: (1) to provide an overview of the current state of scholarly discussions on life histories and retirement, (2) to formulate recommendations for future research, and (3) to discuss implications for organizational and public policy.

Changing Life Courses

The present older workers and recent retirees in developed societies have grown older in times where major societal changes, as well as changes in individual life courses, have taken place. Various structural changes (e.g., the shift from an industrial to a post-industrial or service economy, globalization) and cultural developments (e.g., secularization, the emancipation of women,

and individualization) form the context in which individual life courses have become increasingly diverse. Without aiming to provide a complete overview of the life course changes in developed societies during the last decades, this paragraph will shortly highlight some important developments in terms of individual life courses during the twentieth century. First, it will describe changing experiences in the sphere of work, such as developments in labor force participation, and job mobility over time. Thereafter, changing experiences in the family sphere will be discussed, such as developments in terms of childbearing, marriage, and divorce.

Changing Working Lives

One of the central developments in terms of work careers in OECD countries in the period since the Second World War is the continued progress made by women in educational achievements and labor market participation (OECD 2002). The gender gap in employment has become smaller due to employment gains for women and employment reductions for men, even though the timing and pace of these developments differ considerably between countries. Whereas in the Nordic European countries, the increase in female labor force participation had already been observed in the 1960s and 1970s, in countries like the Netherlands, Ireland, and Portugal, this trend was more pronounced in the 1980s and 1990s. Between 1980 and 2000, for example, the gender gap in employment rates of men and women narrowed by more than 20 percentage points in these latter three countries (OECD 2002). In these countries, clear intergenerational differences in employment patterns have been found, where successive birth cohorts of women show a considerable increase in terms of (re)entry in the labor market. In the Netherlands, for example, a study on changing life course experiences across birth cohorts has shown that about 60 per cent of the women born between 1961 and 1970 have a full-time or part-time job at age 30, compared with 36 per cent of the women born between 1941 and 1950 (Liefbroer and Dykstra 2000). In several southern European countries, such as Italy, Greece, and Spain, the gender employment gap has narrowed, but was still considerable at the beginning of this century (OECD 2002). Fig. 11.1 shows the labor force participation rates for men and women for a selection of OECD countries in 2013, sorted by the labor force participation rates of women. Even though labor force participation of women increased considerably during the last decennia, it should be noted that part-time work is still more common among women than among men across OECD countries (OECD 2014a).

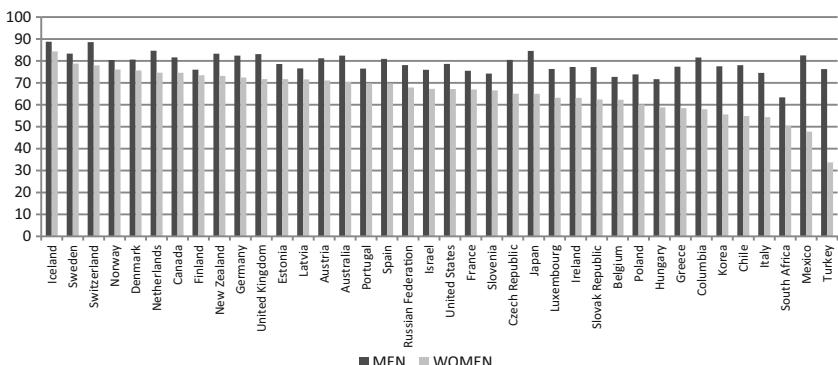


Fig. 11.1 Labor force participation rates in 2013 of individuals age 15–64 years in OECD countries, by gender (Source: OECD Labor Force Statistics (OECD 2014b))

The nature of work and careers seems to have changed over time as well, although here considerable differences can also be observed between countries. A widespread assumption in the employment literature is that “globalization breeds widespread employment flexibility that translates into unstable, fragmented and precarious employment careers” (Mills and Blossfeld 2006: 465/466), which has been referred to as the ‘patchwork career thesis’. However, results of a comparative study across 12 different OECD countries to test this thesis among mid-career men—a group of workers who are already established in the labor market—show a mixed picture. The extent to which the level of employment flexibility has changed over time seems to be largely dependent upon the institutional country context. Whereas in countries such as Italy, Sweden, and Germany, no evidence of the emergence of patchwork careers could be found among mid-career men, in other countries such as the Netherlands and the USA, mid-career men increasingly experienced patchwork career patterns (Blossfeld et al. 2006). By analyzing data of different retrospective life history surveys in the Netherlands, Luijkx et al. (2006) have, for example, shown that male careers have become more non-standard and flexible over time. A steady increase in career mobility (i.e., downward, upward, and lateral mobility) is observed, particularly in the last decades of the twentieth century (Luijkx et al. 2006). For the USA, a meta-analysis of studies on employment mobility by Mills et al. (2006) shows that overall levels of mobility in the USA are high and have increased since the 1970s. Even groups that were traditionally perceived as more ‘protected’ in the labor market, such as male white-collar workers and more experienced workers, were increasingly exposed to job loss (Mills et al. 2006).

Changing Family Lives

Not only in the sphere of paid work, but also in the family domain, important changes have been observed during the last decades. The average number of children per woman (i.e., the completed fertility rate) declined across cohorts in almost all countries in the OECD Family Database. Women born in 1950 had, on average, more children at the end of their childbearing years as compared with women born in 1965. Fig. 11.2 shows the completed fertility rates per birth cohort for a selected group of countries for which the data are available. Related to these numbers on completed fertility is the share of women remaining childless. The share of definitive childless women per cohort increased noticeably for the cohorts born between 1950 and 1965. In the Netherlands, for example, the percentage of definitive childlessness increased from 14.6 per cent among women born in 1950 to 18.3 per cent of women born in 1965. Moreover, changes in terms of the timing of childbearing have been observed. In the vast majority of OECD countries, the transition into motherhood has been postponed since the 1970s. Whereas in most countries (e.g., France, the Netherlands, Denmark), the average age of women at birth of a first child showed the steepest increase between 1970 and the mid-1990s, for other countries (e.g., Czech Republic, Hungary, Portugal), the increase was more pronounced between the mid-1990s and 2009. The average age at birth of a first child in OECD countries was 27.8 years in 2011 (OECD 2014c).

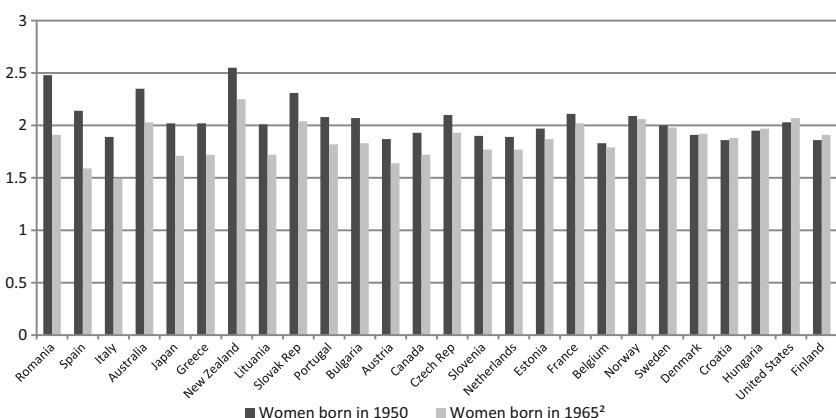


Fig. 11.2 Completed fertility rates¹, cohorts of women born in 1950 and 1965
(¹ Defined as the number of children actually born per woman for a given cohort of women by the end of their childbearing years. ² Women born in 1962 in Japan and 1964 in France) (Source: OECD Family Database (OECD 2014c))

Concurrently with changes in childbearing patterns, important changes in terms of the formation and dissolution of partner relationships have also taken place. Partner relationships seem to have become more diverse. Increasingly, individuals cohabit before they get married, postpone marriage, or do not marry at all. Cross-national analyses by Hiekel (2014) based on data of the Generations and Gender Surveys¹ have, for instance, shown that the share of first unions that started as unmarried cohabitation increased considerably for subsequent birth cohorts in a broad range of European countries. Even though the starting values as well as the magnitude of the growth differ between countries, generally there seems to be a trend toward unmarried cohabitation as the first co-residential union type formed. The permanency of cohabitation (i.e., the median duration) generally increased across cohorts as well, which mainly seems to be driven by the increasing postponement of the transition into marriage (Hiekel 2014: 14–19). Data from the OECD Family Database (OECD 2014c) show the decreasing popularity of marriage over time. Since the 1970s, crude marriage rates² have dropped for almost all OECD countries. Moreover, marriages have become less stable. Fig. 11.3 presents the increase in crude divorce rates between 1970 and 2008 for a selection of countries, based on data from the OECD Family Database. It clearly shows that divorce rates increased in most of the OECD countries since the 1970s.

The changes in individual life courses that have been observed during the last decades will be reflected in the lives of many individuals that are

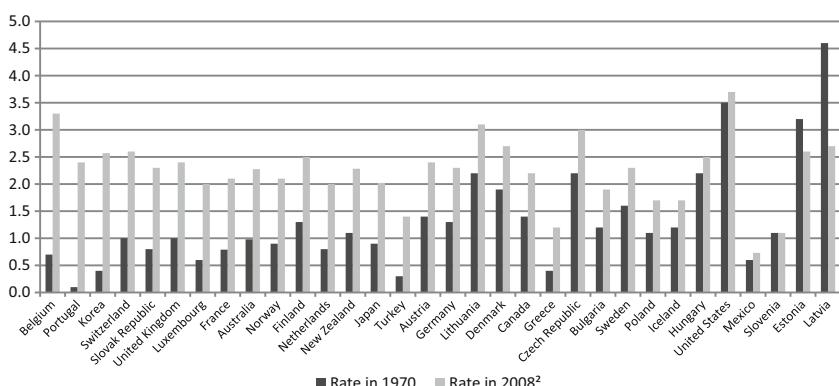


Fig. 11.3 Crude divorce rates¹ in selected OECD countries in 1970 and 2008
(¹ Defined as the ratio of the number of marriages that are dissolved in a given year to the average population in that year, per 1000 inhabitants. ² Data refer to 2007 for the UK, Australia, Canada, Japan, Greece, and Mexico; 2006 for the USA and France) (Source: OECD Family Database (OECD 2014c))

approaching their late careers. Older workers are an increasingly heterogeneous group in terms of their work and family histories, and this variation in earlier life experiences is often assumed to be of importance for understanding differences in their retirement-related decisions and experiences: “retirement decision processes evolve from a variety of contextual influences and lifelong experiences in divergent realms” (Szinovacz 2003: 29). Especially for studying the attitudes and behaviors of older individuals, it might be important to take variation in terms of earlier life experiences into account, given that they draw from a relatively great ‘pool of experiences’ (Pienta 1999: 70). The next paragraph will elaborate on the theoretical perspectives that have been used in the existing literature to link life histories to retirement transitions.

Life Histories and Retirement: Theoretical Starting Points

The life course perspective is the central theoretical starting point for research on the relationships between earlier life experiences and retirement. Key organizing concepts of the life course are transitions and trajectories (Elder and Johnson 2003). Transitions—gradual changes that are generally tied to entering or exiting roles—are assumed to be embedded within multiple interdependent trajectories (for example, work, family, and health trajectories). This suggests that single transitions, such as the transition from work into retirement, cannot be understood in isolation from the experiences and contexts that surround it (Settersten 2003). According to the life course perspective, earlier experiences in different life spheres, but also the lives of other individuals ('linked lives'), socially shared ideas regarding the appropriate timing and sequencing of life events, and historical time and place are important contexts shaping the lives of individuals (Dykstra et al. 2007). In this section, the theoretical mechanisms that have been distinguished in the literature to link earlier life experiences to retirement processes will be described, followed by a discussion on theoretical ideas about retirement decision-making.

Linking Mechanisms

Even though the life course perspective proposes that earlier life experiences are of importance for understanding later outcomes, it does not provide clear-cut theoretical ideas about mechanisms linking these factors to specific

outcomes. In the sociological retirement literature, however, some ideas have been presented about these linking mechanisms.

Generally, earlier life experiences are expected to affect retirement via their influence on the individual opportunity structure in later years. In this respect, pensions and other types of individual financial resources are the most obvious mechanism for linking earlier events to later outcomes (Henretta 2003), given that these resources are dependent upon earnings over time. Not only experiences in the work sphere, but also family histories have been found to be related to pension coverage (Yabiku 2000; Price and Ginn 2003), and pre-retirement wealth (Wilmoth and Koso 2002; Holden and Kuo 1996). Given that the impact of life experiences might accumulate over time—either positively (cumulative advantages) or negatively (cumulative disadvantages)—financial inequality is particularly high among older individuals (O’Rand 1996), which might offer an important explanation of variation in retirement behaviors and experiences. Those individuals having a more beneficial financial situation might be able to retire relatively early. In studies on life histories and retirement, the financial argument is the most central argument that has been used to theoretically link earlier experiences to later outcomes: Earlier life experiences will affect preretirement financial opportunities and constraints, and consequently, retirement decisions (e.g., Hank 2004; Hayward et al. 1998; Szinovacz and DeViney 2000; Damman et al. 2011).

Earlier life experiences might, however, not only shape retirement transitions by affecting the financial situation in late life, but also by affecting other aspects of the late-career opportunity structure, such as the older individual’s health condition, work context, or family situation. For example, individuals who experienced health problems in mid-life might be more likely to experience health problems during late careers as well—given that health problems seem to have long-term consequences (Blackwell et al. 2001)—and these preretirement health problems might increase the likelihood of early retirement. Those who invested more in education might be more likely to have a job characterized by a high level and broad scope of cognitive challenge during their late career (Hyllegard and Lavin 1992), which might make continued work more attractive. Older workers who made the transition into parenthood relatively late might be more likely to have dependent children still living at home, which could make individuals feel less entitled to adopt the retiree role (Choi 2002). Via this line of reasoning, therefore, earlier life experiences might also be associated with retirement because of their consequences for the non-financial aspects of the late-career opportunity structure.

Yet another mechanism that has been proposed in the literature to link earlier experiences to retirement is an individual’s orientation toward work

and family roles across the life course. This mechanism does not specifically refer to the late career opportunity structure as a mediating factor between earlier experiences and later outcomes, but rather points at underlying orientations that are assumed to shape life experiences both earlier and later in life. The general assumption is that the lives of individuals show a great deal of continuity between earlier and later points in time due to these underlying orientations toward work careers and family life. For example, more work-oriented women are expected to have stronger ties to the labor market both earlier and later in their life course, resulting in the expectation that “delaying childbearing, forgoing childbearing, and having smaller families will foster stronger labor force attachment throughout the life course – including retirement years” (Pienta 1999: 72). Hank (2004) also refers to women’s career orientations to interpret his study finding that women who made the transition into motherhood relatively late or mothers who remained employed during the early childrearing years were more likely to delay retirement. Postponing childbearing and postponing retirement are both expected to be driven by a relatively strong work career orientation. Fig. 11.4 provides a schematic overview of the three central hypothesized mechanisms linking earlier life experiences to retirement processes.

Retirement Decision-Making

The ways in which late-career opportunity structures and orientations toward work and family are translated into retirement transitions remain unspecified in the life course perspective. The life course notion of ‘agency within structure’ suggests that individuals actively create their life course within the opportunities and constraints of their social worlds (Settersten 2003),

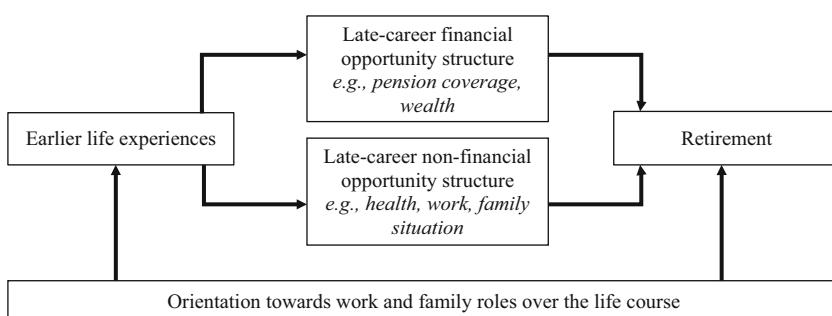


Fig. 11.4 Theoretical mechanisms linking earlier life experiences to retirement transitions

but does not specify how individuals will make their decisions. As Mayer (2009) has noted in a recent review, “life course sociology lacks a coherent body of theory” (p. 423). Studies on retirement therefore often—implicitly or explicitly—incorporate a resource perspective and rational choice framework to formulate hypotheses. The term ‘rational choice’ refers to a family of behavioral theories in the social sciences “that proceed from the twin assumptions that human beings pursue goals and that, being confronted with opportunities and limitations for reaching their goals, they do so in a more or less intelligent way” (Lindenberg 2006: 548). From a rational choice perspective, individuals making work and retirement decisions during late careers are generally assumed to weigh the pros and cons, the costs and benefits, or the push and pull factors of their current life situation and their expected future situation in retirement (Feldman and Beehr 2011; Van Solinge and Henkens 2014). If the perceived benefits of retirement exceed the perceived benefits of working, individuals are expected to decide to make the transition into retirement. The factors that are assumed to play a role in these considerations are not restricted to the individual’s financial resources, but can, for instance, also include the individual’s health, work situation, social resources, and value orientations.

When systematically applying the theoretical reasoning that earlier life experiences might be associated with retirement via the financial late-career opportunity structure, via the non-financial late-career opportunity structure, or via underlying orientations, it becomes clear that opposing forces might be at work between specific earlier life experiences and retirement. For example, the experience of upward mobility during mid-life might positively affect the financial opportunity structure in preretirement years. Given this more beneficial financial situation, retirement (versus continued work) might become a viable and attractive option at a younger age. Therefore, upwardly mobile individuals can be hypothesized to retire relatively early. However, when also taking the potential consequences of earlier life experiences for the non-financial aspects of the late-career opportunity structure into account, an opposite prediction can be made. In the case of upward mobility, it can be expected, for instance, that upward career mobility improves working conditions (e.g., more self-direction), which might make continued work relatively attractive. Consequently, when reasoning via the work opportunity structure, upwardly mobile individuals can be hypothesized to retire relatively late. This complexity of potentially offsetting ways in which earlier life experiences could be related to retirement transitions has only recently been made more explicit in the retirement literature (e.g., Damman et al. 2011; Raymo et al. 2011; Hank 2004).

One difficulty when studying the relationships between earlier life experiences and retirement is that the theoretical utility of the conceptualization of retirement as a rational decision-making process will be dependent upon the extent to which retirement transitions are the result of personal choice (Wang and Shultz 2010). Research has shown that many retirement transitions (around 25–30 per cent) are perceived as forced or involuntary (Szinovacz and Davey 2005; Van Solinge and Henkens 2007). Therefore, earlier life experiences might be stronger predictors of some aspects of the retirement process than of other aspects. For example, earlier life experiences might be stronger precursors of subjective processes that precede the actual act of retirement such as retirement timing intentions, than of actual retirement behavior (Beehr 1986). Whereas retirement intentions might reflect the outcome of the individual considerations of the pros and cons associated with continued work versus retirement at a given age, the actual age of retirement might, for a considerable share of individuals, be determined by external forces that restrict the leeway that individuals have to make their own decisions. As Szinovacz (2003) argues, “It is only when choice exists that cost-benefit considerations enter retirement decisions” (p. 21). This suggests that to achieve an in-depth picture of the life course embeddedness of retirement, it would be informative to simultaneously examine several aspects of the process of retirement—such as retirement planning, retirement preferences and intentions, actual retirement timing, and postretirement adjustment—in relation with experiences earlier in life.

Life Histories and Retirement: Empirical Findings

Empirical research on retirement has predominantly been focused on proximal precursors of retirement, that is, precursors that are close in time to the retirement transition (Settersten 2003). These proximal characteristics might imply earlier life events (Szinovacz 2003; Henretta 2003), but rarely convey detailed information about specific earlier life course experiences. Some studies have looked a bit further back in time by supplementing proximal factors with single indicators of career or marital continuity, such as job tenure (Brown and Warner 2008; Hayward et al. 1989; Szinovacz and Davey 2005; Wong and Hardy 2009; Jones and McIntosh 2010), years in the labor force (Mutchler et al. 1997; Van Solinge and Henkens 2005), number of times laid off (Flippen and Tienda 2000), or the length of one’s current marriage (Ho and Raymo 2009; Pienta 2003). Even though these studies assume that it is important to take information about the prior life course into account for

understanding retirement transitions, they do not provide detailed insights regarding the extent to which and how specific earlier life experiences affect retirement decisions and experiences. However, the number of studies that more systematically examine the relationships between earlier life experiences and retirement seems to have grown rapidly during the last decade. In the following paragraph, empirical findings regarding work histories and retirement timing will be described, followed by a paragraph on family histories and retirement timing. Thereafter, attention will be paid to empirical research on more subjective aspects of the retirement process in relation with life histories, which is an area of research that has received only limited empirical attention thus far.

Work Histories and Retirement Timing

In the literature focusing on retirement-related behavior—mostly conducted by sociologists—the role that earlier life experiences in different life spheres play for understanding retirement transitions has nowadays received considerable attention. With respect to work careers, these studies have, for instance, investigated the role of diverse career pathways (Han and Moen 1999; Pienta et al. 1994; Kovalenko and Mortelmans 2013), exposure to certain types of jobs over the career (Elder and Pavalko 1993; Hayward et al. 1998; Raymo et al. 2011), and diverse indicators of employment continuity and career mobility (Damman et al. 2011; Finch 2014; Raymo et al. 2009; Raymo et al. 2010; Singh and Verma 2003; Henretta et al. 1993) for explaining late-career labor market behaviors. Even though insights are still rather fragmented—given that studied earlier life experiences and country contexts differ much between studies—a general sketch of some findings could be provided. With respect to labor force participation, research findings have shown that women who have worked continuously throughout the life course are more likely to work during later life (Pienta et al. 1994), and to work beyond pension age (Finch 2014), which seems to be in line with the notion of continuity between earlier and later points in time in terms of labor participation. For men, the findings are mixed, with some studies showing that a history of unemployment and labor force exits places male workers at a higher risk of retirement (Hayward et al. 1998), and other studies showing that discontinuous employment and involuntary job loss in mid-life result in lower odds of retirement (Raymo et al. 2009; Raymo et al. 2011).

With respect to job mobility, the research results generally seem to suggest that those individuals who followed a traditional stable career path

retire relatively early. Han and Moen (1999) showed that those retirees who have had an ‘orderly career path’—characterized by ladder climbing within the same firm—retired the earliest, and among those, men more so than women. Similarly, by analyzing more recent data of the SHARELIFE³ survey, Kovalenko and Mortelmans (2013) have shown that individuals following a so-called ‘stepping stone’ career trajectory—characterized by a main job of a prolonged duration that is held until retirement—retire earlier than those individuals who had a ‘hypertransitional’ career trajectory. Other studies suggest as well that mobility is associated with later retirement among men, by showing that mid-life employer changes are associated with weaker intentions to retire early (Damman et al. 2011), and that a shorter job tenure decreases retirement risks (Hayward et al. 1998).

Family Histories and Retirement Timing

The role of earlier experiences in the family sphere—such as fertility and marital histories—for understanding retirement-related behaviors has been examined in various empirical studies. With respect to fertility histories, the relationships with late-career labor market behaviors were traditionally especially examined among women. However, increasingly, these relationships also receive attention in studies including men (e.g., Damman et al. 2011; Hank and Korbmacher 2013). Research findings regarding fertility histories and retirement are rather mixed though, even when focusing on women. Whereas some studies have shown that the number of children is not clearly associated with labor force exit among women (Pienta 1999; Finch 2014), other studies have shown that having (more) children is associated with later retirement (Chung 2010; Hank 2004; O’Rand and Henretta 1982). A recent study by Hank and Korbmacher (2013) based on the SHARELIFE data has revealed that the impact of the number of children on women’s retirement timing differs across birth cohorts. Among women born before 1940 having more children is related to lower odds of entering retirement, while among women born after 1940 having more children is related to a higher odds of retirement, which might be due to greater economic and institutional opportunities for early exit among these younger cohorts. Also with respect to the timing of having a first child, conclusions vary across studies. Some authors conclude that the timing of first birth does not seem to matter much for explaining late-career labor force exit (Finch 2014; Hank and Korbmacher 2013), others conclude that having a first child relatively *early* is related to a lower likelihood of self-defined retirement and labor force exit (Chung 2010), and yet others

find that a relatively *late* transition into motherhood is associated with rejection of the retiree identity (Szinovacz and DeViney 1999) and later labor force exit (Hank 2004; Pienta 1999). Damman et al. (2014) showed that women who transitioned into motherhood relatively late and still have children living at home during preretirement years intend to retire relatively late, but do not actually retire later. Overall, it should be noted that the way in which fertility histories are measured and included in the statistical models (e.g., the age boundaries for distinguishing ‘early’ and ‘late’ first births and the reference groups used) differs greatly between studies. Moreover, studies vary a lot in terms of other variables that are taken into account in the models, operationalization of dependent variables, country contexts, and birth cohorts studied, which might all account for differences in findings across studies.

With respect to marital histories, the research findings seem to be more unequivocal, especially when focusing on women. Generally, currently divorced women have been found to be more likely than married women to be engaged in paid work during late careers (Choi 2002; Pienta 1999; Pienta et al. 1994) and seem to retire later (e.g., Brown and Warner 2008; Raymo et al. 2011), suggesting that the experience of a divorce affects retirement timing. By focusing on current marital status, however, the long-lasting impact of divorce experiences earlier in life and the effect of repartnering cannot be captured. Therefore, recent studies have examined the impact of marital histories in more detail. Findings from studies in the UK and the Netherlands suggest that women who have ever been divorced and did not repartner are most likely to extend their working lives (Damman et al. 2014; Finch 2014). Women who have ever been divorced and repartnered were found not to differ from continuously married women in terms of their retirement intentions and behavior (Damman et al. 2014; Szinovacz and DeViney 2000). This suggests that repartnering might at least partly compensate the negative consequences of a divorce. Among men who live with a partner, late-career labor market behaviors also do not seem to differ much between those who did and those who did not experience a divorce earlier in life (Finch 2014; Szinovacz and DeViney 2000). With respect to the timing of a divorce, research suggests that especially experiencing a divorce later in mid-life is associated with weaker intentions to retire early among both men and women (Damman et al. 2011; Damman et al. 2014). Also here, it should be noted that the impact of divorce experiences might differ between country contexts. Fasang (2008) showed in her comparative study on the timing of pension entrance in Germany and the UK that the impact of divorce on pension entrance differs between countries, which she attributed to the country differences in terms of policies on pension sharing between spouses.

Life Histories and Subjective Processes Surrounding Retirement

In the literature on life histories and retirement, there are only a handful of studies that simultaneously examine several aspects of the process of retirement (e.g., Han and Moen 1999; Damman et al. 2011; Moen et al. 2005). Moreover, the relationships between earlier life experiences and more subjective aspects of the retirement process—such as the way in which individuals experience their retirement—have only received limited attention thus far in quantitative studies. Some qualitative studies have suggested, however, that earlier life experiences might be important for understanding perceptions of retirement and adjustment. Patterns of discontinuity earlier in life, such as multiple job positions, have been suggested to limit perceived control over late-career work and retirement transitions (Fournier et al. 2011), but also might assist individuals in dealing with later life challenges, such as the transition into retirement (Nuttman-Shwartz 2004; Price 2000). Moreover, the ease of adjustment to retirement may be dependent upon attachment to the work role over the life course (Barnes and Parry 2004). For example, Kloep and Hendry (2006) have concluded that “adjustment to retirement seemed relatively easy for those women who always had a second role as home-makers. They simply shifted from one possible self to another well-established one” (p. 590). Even though these qualitative studies suggest that earlier life experiences are of importance for understanding subjective processes surrounding the act of retirement, insights into these relationships based on quantitative studies are still scarce. Existing studies suggest that both work career experiences (e.g., career path) and marital histories are associated with differences between retirees in terms of their retirement satisfaction (Price and Joo 2005; Quick & Quick and Moen 1998) and the extent to which they miss aspects of work after retirement (Damman et al. 2013b). For example, divorced retirees without a partner have been found to be more likely to miss the social dimensions of work (i.e., social contacts and social status) compared with continuously married retirees, and those who repartnered after divorce are more likely to miss financial resources (Damman et al. 2013b).

Conclusion and Discussion

The aging of populations in many developed countries has put the issue of retirement high on both scientific and policy agendas. To understand variation in retirement transitions, research has, to a large extent, focused on proximal

precursors, that is, factors that are relatively close in time to retirement transitions. Recently, however, retirement research has broadened its view to more distal experiences earlier in life. The scientific literature on the role of life histories for understanding retirement transitions has grown rapidly during the last decade. The central purpose of this chapter was to provide an overview of the current state of scholarly discussions on life histories and retirement. Both theoretical approaches and empirical findings were described.

The review of the theoretical background of studies on life histories and retirement highlighted the life course perspective as the central guiding theoretical framework. Different mechanisms are theoretically distinguished to link earlier life experiences to retirement transitions. Earlier life experiences are assumed to affect retirement transitions via their consequences for the financial late-career opportunity structure, via the non-financial late-career opportunity structure, or via underlying orientations toward work and family. Consequently, opposing forces might be at work between specific earlier life experiences and retirement. Another complicating factor for formulating hypotheses on the relationships between earlier life experiences and retirement is that retirement transitions are not always fully the result of personal choice. Therefore, earlier life experiences can be expected to be stronger predictors of some aspects of the process of retirement (e.g., retirement intentions) than of other aspects (e.g., actual retirement behavior).

The overview of empirical literature on life histories and retirement generally suggests that life histories are of importance for understanding retirement-related decisions and experiences. Various earlier life experiences in both the work and family life spheres have been shown to 'set the stage' (Settersten 2003: 29) for the way in which older individuals approach their later years. The empirical research on life histories and retirement is, however, still rather fragmented. The aspects of the retirement process receiving attention, types of earlier life experiences examined, ways of measuring life histories, sampling frames, country contexts, and birth cohorts all differ greatly between studies. This makes it hard to compare the findings and draw overarching conclusions regarding associations between specific earlier life experiences and retirement. There still remain a lot of puzzles to be solved and questions to be answered to further improve our insights regarding the life course embeddedness of retirement.

Future Directions

Retirement is increasingly conceptualized as a long-term and multidimensional process embedded within interdependent life trajectories in different

life spheres. This conceptualization has implications for the focus, theoretical approach, and study design of future research on life histories and retirement.

First, a central assumption of the life course perspective is that individual development is ‘multispherical’ (Settersten 2003), which implies that individual development takes place in multiple life spheres and that experiences in these different spheres are closely connected to each other. Further extending the types of earlier life experiences studied—and examining them simultaneously—might therefore improve our understanding of retirement and its life history predictors. Even though earlier life experiences in areas that are central to the lives of individuals (such as their work and family) are addressed in the existing literature, other potentially important areas of life such as education and training, involvement in unpaid work, leisure activities, health trajectories, and migration history are covered to a lesser extent. Moreover, the literature is largely focused on earlier life experiences of older individuals themselves. In line with the life course notion of ‘linked lives’, it can be expected that earlier life experiences of the spouse play a role as well. To study the role of the partner’s life history, researchers may consider adopting a ‘multi-actor’ research design, in which not only older workers but also their partners are asked about their experiences earlier in life.

Second, retirement is often conceptualized as being a long-term process consisting of several broad phases such as preretirement planning, retirement decision-making, and postretirement adjustment (Wang and Shultz 2010). Most empirical studies on life histories and retirement focus on just one aspect of the retirement process, that is on actual retirement behavior. More subjective aspects of the retirement process that precede or follow upon this behavior have received only limited attention thus far, as well as the way in which individuals shape their lives in retirement. For instance, one specific aspect of this postretirement process that needs further study is the phenomenon of ‘bridge employment’, which might either reflect a continuation of unstable employment trajectories or a major career shift (Henretta 2003). Given that the impact of earlier life experiences can be expected to vary across aspects of the retirement process, simultaneously examining various aspects of the retirement process might be informative. This would require a longitudinal research design, in which older workers are followed over time in their transitions from work into retirement.

Third, paying more systematic attention to the mechanisms linking earlier life experiences to retirement transitions might be useful because this will

offer insights into the question why (or why not) earlier life experiences are related to retirement. Some studies have started to pay more attention to these linking mechanisms, for example, by building statistical models in different steps and by testing the mediating role of the late-career opportunity structure. In a first step, the effects of earlier life experiences are estimated without taking measures of the late-career opportunity structure into account. In a second step, measures of the late-career opportunity structure are included (e.g., Damman et al. 2011; Raymo et al. 2011). Both studies that take this approach conclude, however, that the life history effects cannot be fully explained by the temporally proximate correlates. These findings might—on the one hand—reflect that the measures of the late-career opportunity structure do not fully capture all relevant aspects of the situation of older individuals. On the other hand, the findings might indicate that other mechanisms (e.g., orientations toward work and family) are of importance for explaining the research findings, for which the theory and data collected still need to be developed further.

Fourth, more attention is needed for the role of the country contexts in which studies on life histories and retirement are conducted and their implications for the study findings. Given that countries differ considerably in their pension systems, welfare arrangements, divorce laws, and family policies, we should be careful with generalizing results from one specific country to other countries (Wang 2012). Explicitly testing differences in terms of the effects of earlier life experiences on retirement transitions between countries that vary in terms of welfare state regimes (cf. Fasang 2008, who compares pathways to old-age pension in Germany and the UK) may therefore be a fruitful direction for future research. This would need data in which comparable measures of life histories and retirement are available across countries. Initiatives like the SHARELIFE data might offer opportunities in this respect (see, for example, Hank and Korbmacher 2013).

Implications

Not only in the scientific literature, but also in the policy-oriented literature, it has been assumed that earlier life experiences continue to affect the lives of individuals even in their later years. For example, it has been suggested that to encourage later retirement, policy interventions might already focus on workers at younger ages (OECD 2006). The existing research on life histories and retirement generally seems to support the underlying assumption

that earlier life events in several life spheres are associated with retirement-related decisions and experiences. This suggests that public and organizational policies aiming at prolonged employment might benefit from viewing retirement as an integral part of the individual life course. It should be emphasized, however, that the current literature on life histories and retirement does not directly test the long-term implications of specific early or mid-career policy measures or practices, but rather focuses on general life events that are often beyond the control of the organization. Further research might therefore be needed in this respect.

A better understanding of how retirement transitions of current retirees are related to their experiences earlier in life might also nourish ideas or expectations about how changing life course experiences will shape the retirement transitions of future retirees. During the second half of the twentieth century, individual life courses have become increasingly diverse. Both work careers and partner relationships seem to have become more versatile, and major responsibilities such as having children are increasingly postponed. Several of these increasingly common life experiences—such as job mobility and the experience of a divorce later in mid-life—have been found to be associated with continued labor force participation and later retirement. When linking the societal developments to these research findings and assuming that relationships between earlier life experiences and retirement are similar among younger cohorts, several changes in life courses can be expected to contribute to a future trend toward later retirement. It should be noted, however, that these expected changes in retirement transitions might intermingle with a trend toward later retirement prompted by recent changes in labor market and retirement policies.

Not only have individual life courses changed considerably and are becoming less standardized, but the societal context in which older individuals make their retirement decisions is also changing rapidly. In many developed societies, this context is shifting from a focus on early retirement to a focus on continued labor participation, which is often accompanied by growing financial uncertainty and individual responsibility with regard to preparing and saving for retirement years. As a result of these developments, retirement transitions and experiences might become increasingly heterogeneous and complex. Moreover, these developments might impact the strength of the relationships between earlier life experiences and retirement, as well as the mechanisms linking the lived past to the present situation. Whether the associations between earlier life experiences and the different phases of the retirement process will be similar among cohorts approaching retirement in the future, therefore, remains an important question for future research.

Notes

1. The Generations & Gender Programme (i.e., GGP) is a large cross-national longitudinal survey of 18–79 year olds, in which a broad array of topics including partnerships, fertility, economic activities, and care duties are included (see: <http://www.ggp-i.org>).
2. In the OECD Family Database, the crude marriage rate is defined as “the number of marriages formed each year as a ratio to 1000 people. This measure disregards other formal cohabitation contracts and informal partnerships”.
3. The SHARE survey (i.e., the Survey of Health, Ageing and Retirement in Europe) is a large cross-national panel survey on health, socio-economic status, and social networks of Europeans age 50 and over, which started in 2004. In the third wave (2008–2009), retrospective life history data on the topics of children, partners, accommodations, employment, health, childhood circumstances, finances, and general life events were collected in the so-called SHARELIFE survey (see: www.share-project.org).

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12

Interventions in Life and Retirement Planning

Anthony Chiva

This chapter concerns Life Planning (LP) interventions for an ageing workforce and explores the ways in which an employer can harness life and retirement planning within their organisation for the benefit of both the organisation and their employees. The chapter suggests that LP should be integrated with other organisational interventions such as performance reviews, training and development, career development, health promotion, and longer working.

What is Life Planning?

Life Planning (LP) is a holistic process, which enables individuals to create, implement, and revise plans for their present and future lives. As such, LP is any form of planning taking place during the life course, while retirement planning is planning that takes immediately prior to retirement.

Holistic means integrating all characteristics, aspects, and features of an individual within the planning process (Ibrahim and Wahat 2015). The process is therefore inclusive within the context of the individuals' lives, their social or economic circumstances, their opportunities, abilities, and desires. In human terms, at a minimum, this means a consideration and integration of the physical, emotional, mental, spiritual, and social aspects of an individual.

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With ageing workforces and the removal of a statutory or fixed retirement age, LP could be a useful tool for managers and human resources (HR) professionals to enable their employees to plan their working lives, and therefore, their retirement date. The retirement decision is often complex (McNair and Flynn 2006) and is impacted by many factors. Managers could utilise retirement planning to enable employees to review their work and retirement plans, thereby reaching a clearer understanding of employees' intentions concerning longer working. Building into LP programmes some of the key questions concerning remaining in work or retiring would be a helpful process both for the workplace and the individual employee.

The Origination of Life Planning

The term LP has evolved and developed from life cycle, lifespan, and life course theories (see: Smith and Baltes 1990; Hansen 1996; Hansen 2001; Johnson et al. 2005). Johnson-Hanks (2002) strongly suggests that life stages are a social, economic, and institutional construct, and appear natural. These perceptions 'largely succeed in making this temporal coincidence of major life transitions feel intuitively "natural"' (Johnson-Hanks 2002). The implication of Johnson-Hanks' statement is that it is easy to perceive typical life transitions as normative and to be expected. However, it may be more effective to think of LP as being undertaken with individuals on different life trajectories, though there may be similarities in their experiences, and these experiences will also be different. LP therefore needs to be seen as an individualised and individualising process, which is empowering (Chiva and Cattley 2011).

The Increasing Complexity of Life Trajectories

In the 1940s and 1950s, excluding the impact of war on life trajectories, there appeared to be a more 'standard' life course (See Fig. 12.1).

This life course consisted of three main elements: a short period in school (5–15 years), followed by paid work or economic activity (15–65+ years),

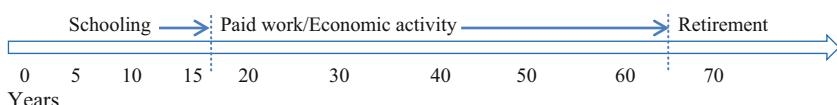


Fig. 12.1 'Standard' life trajectory

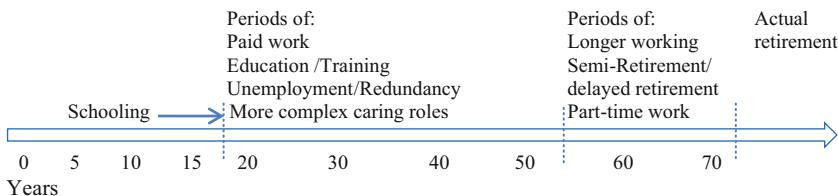


Fig. 12.2 Life Trajectories

and finally, a short period of retirement (65 or so–70+ years). The implication of this is that for many there were expectations about the length of the working life, and the potential for retirement at 65 years (Phillipson 2002; Hirsch 2003). This was an early twentieth-century concept. However, various factors, including the economic downturns and upturns, technological development, and a move away from industry towards services, have led to significant changes in working life trajectories. These changes have grown and then continued to the present time, making life more precarious and uncertain (Beck 1992; Barbier 2004).

The implications of these more complex life trajectories are that the retirement process that could have been expected by people 20 years ago no longer applies to younger cohorts. The provision of LP therefore needs to be more flexible to take into account these more complex life trajectories (see Fig. 12.2).

The Development of Life Planning

LP is mainly a late twentieth-century term, and prior to this, the focus was mainly on the terms and concepts associated with pre-retirement, mid-career planning or mid-life crisis management, and induction programmes for new employees (CIPD 2016a).

Other aspects of LP were sometimes covered in specific themes or topics, such as career planning (National Careers Service 2016), financial planning (FSA 2008; CFEB 2010; Vass, 2012a), health education and well-being (Tones et al. 2013), and personal development (CIPD 2016b). Life coaching (Western 2012; Whitworth 2007) has developed over the last 20 years and is a form of personal and professional development.

These earlier forms of planning provision therefore focused on more specific periods of life or life themes. Pre-retirement education (PRE) was usually focused on ‘cliff edge’ provision at 64 or 65 for men, and if women attended, 59 or 60. Provision at this late stage in the working life could have some

impact, although this would obviously be limited. Clearly, earlier provision would make a bigger difference in the person's life, especially in financial terms. There were organisations and individuals who sought to promote earlier provision at 50 or 55 years (Heron 2012). The case for earlier provision was only accepted by a limited number of organisations and employers.

The UK Department of Work and Pensions (Watts et al. 2015) undertook research concerning mid-life/mid-career planning with a wide range of delivery methods. One outcome of this research was that the National Careers Service is now undertaking some mid-life provision. In this case, mid-life was defined as over 50. This author would contest the concept of mid-life as being in a person's 50s. This is really later career planning and not mid-life planning. Currently, average lifespans are late 70s–80s in Europe; on this basis, mid-life would be within an age range of 35–40 years and excludes the 50s altogether.

Perhaps, the most recognised form of LP provision, though episodic, was and is currently associated with career development and planning. This normally commences in UK schools, initially with subject choices at 12–13 years. In many European schools where a baccalaureate system is used, choices of subject are made later in the school career. Subject choice is often associated with career planning events and sometimes with visits to employers. The development of placements, termed 'work experience' with employers during later school years, has made a useful contribution to this process, though the value of the work experience depends on the understanding of the younger person of their career interests and the availability of work experience in these key areas, and how these can be matched. Career planning is also available in colleges and universities and sometimes during early working careers. Some workplaces offer mid-career planning to enable employees to check for their interests in diversifying their career. Baruch (2006) discusses the need for integrating individual career planning with organisational support for career development. Further opportunities for career planning are associated with unemployment, outplacement, and redundancy.

How Do People Plan?

Evidence suggests that LP is undertaken by individuals in different ways. Some people plan unconsciously, or outside awareness, while others plan consciously and sometimes methodically (Friedman and Scholnick 2014). The range of planning that takes place varies, depending on the individual's personality, experience, priorities, focus, sometimes the challenge of the situation and the provision that is available, usually from the employer (Binswanger and Carman 2012).

Does Life Planning Work?

Some of the earliest work undertaken (in the UK) on the structure of PRE and its effectiveness was by Phillipson (1982) and Coleman (1983). These studies indicated that pre-retirement courses were: largely designed for men in white collar jobs, focusing on some key topics such as money and health, and using experts to give lectures. Both Philipson and Coleman concluded that Pre-Retirement Courses needed to be as follows: modernised, taking into account effective adult education (this aspect is still absent in many LP courses delivered in the twenty-first century); holistic—covering all the aspects of human lives, involving partners and other important relationships; inclusive of the needs of both men and women; and based on the priorities of the participants. These recommendations were made on the basis that if these guidelines were followed, the courses will be more relevant and interesting to the participants involved in the courses and therefore more effective.

Noone, Stephans, and Alpass (Noone et al. 2009 & Noone et al. 2010) have developed research methodologies to demonstrate that PRE can enhance the quality and well-being of later life. They indicate that in the 1970s and 1980s, empirical studies suggested that those who participated in pre-retirement planning were more likely to report greater well-being in retirement and cite Becker et al. (1983) and Glamser (1976). More recently, research indicates that well-being in retirement depends on many factors, including wealth, health, and adaptation to the psychosocial changes after leaving the workplace (Dorfman 1989; Quick and Moen 1998; Schellenberg et al. 2005). Schellenberg et al. (2005) found that life satisfaction was positively related with non-financial planning activities.

In 2010, the Pre-Retirement Association/Life Academy (2011) undertook a 50-plus project on behalf of the Department for Work and Pensions (DWP). The project involved a one-day LP course. Evaluations were undertaken pre-course, immediately post-course, and a follow-up at three months to identify what actions had been taken by the participants. Seventy per cent of the participants had taken action by the three-month follow-up. This demonstrates the impact that can occur within an effective LP programme.

What is Effective Life Planning?

The LP schedule outlined in Table 12.1 would be a comprehensive approach on which an employing organisation could base their LP and Retirement Policy. LP is much more than just money and pensions planning, though these

Table 12.1 Ideal provision of life planning across the working/life course

Stage	Age	Topic	Purpose	Delivery method	By whom
Joining an employer: introductory session	Any age	<i>Purpose:</i> To outline the policies and practice of the employer to new recruits Introduction to employer policies, including HR, performance review, pension provision, wages and benefits, education and training, age diversity, and pre-retirement strategy	To create action plans for the future <i>Purpose:</i> To enable the employee to consider a holistic review of their lives at this stage, including: their life purpose, work-life balance, their current roles, possible future roles, relationships (in and out of work), health and well-being and review financial position. These sessions need to enable the individual to deeply focus on their actual health and introduce health promoting and health preventative strategies into their lives, thereby reducing the future incidence of cardiovascular disease, strokes, diabetes, and cancers.	A course is preferable, possibly supplemented by online information or exercises. Thus, there is an integration of planning with career, and health and money.	HR, pensions and training department; or external consultants possibly professional life planners, life coaches, mentors
Mid-career review	Between 35 and 45 years	<i>Purpose:</i> To introduce the concept of working life careers. Invitation to review directions and goals of the employees. Invitation to review financial position in relations to current priorities and future retirement	To adjust existing plans and create future action plans <i>Purpose:</i> To enable the employee to consider a holistic review of their lives at this stage/phase, including life purpose and their current priorities, their current roles, possible future roles, relationships (in and out of work), health and well-being, use of time and work-life balance, and working roles, possible future work roles, and review life themes. To review paid work in these contexts	A course is preferable, possibly supplemented by online information or exercises	Pensions, external consultants, LP professionals
Later career planning	45–55 years	To check current plans, modify/re-adjust and generate further action plans for the future			

Pre-retirement planning	55–65 years	<i>Purpose:</i> To review LP for the important areas of life: life purpose, paid work, money, health and well-being, relationships, and use of time at this stage/phase in life To identify options for work exit, such as phased retirement, semi-retirement (part-time working), or 'cliff edge' retirement To focus in-depth many areas that require detailed attention To reappraise current life plans and modify for the future	A course is preferable, possibly supplemented by online information or exercises	Pensions, external consultants, LP professionals
Post-work /later career planning	Approx. 66–70 years	<i>Purpose:</i> To review working life and options for future income generation To holistically develop an integrative strategy for future and create action plans for a post-career and work future	A course is preferable, possibly supplemented by online information or exercises	Pensions, external consultants, LP professionals
Mid-post-retirement (some people in this phase of life are experiencing a 'hiatus', and the need to reframe their lives and create new purpose)	Approx. 70–78	<i>Purpose:</i> To renew life purpose, if required, and reframe thinking To identify ways to maintain positive strategies for this period of life	A course is preferable, possibly supplemented by online information or exercises	Pensions, external consultants, LP professionals

are important. The most effective life and retirement planning would adopt a *holistic and integrated approach* across the organisation and the employee's working life course (as already indicated). In terms of ideal provision for LP, a little more information may be helpful (Noone et al. 2010; Smith 1999).

Holistic and integrated LP approaches encompass all aspects of an employee's/person's life. This needs to include planning concerning: personal priorities/life purpose, values and ethics (Jung 1955), income generation such as paid work, use of time (Dregan and Gulliford 2013), relationships, health and well-being (Kelly et al. 1991), and money management. From experience of LP and retirement courses, some people also identify other subjects or topics that are important to them, such as motivation, location, housing, stress management, spirituality, bereavement and caring roles—supporting older, adult, and younger relatives (including grandparenting) and long-term care for themselves or parents.

This indicates the breadth of subjects, topics, and issues that people identify when you ask them questions like: '*What does life planning mean to you?*' Or '*What does Pre-Retirement mean to you?*' Or '*What does this time of your life mean to you?*'. These are very good starting points, at the beginning of an LP programme, in order to establish the needs of an individual, or group, undertaking LP. These types of question were originally suggested by Allin Coleman (Coleman and Chiva 1992). Effective LP would use appropriate adult learning approaches, methods, and strategies, the most effective of these being facilitated learning (Mezirow 2000).

What Is Facilitated Learning?

For LP to be most effective, it needs to use facilitated learning. Facilitated learning *excludes* or *minimises* the use of presentations, lectures, and many other traditional teaching techniques.

Facilitated learning and effective adult education use interactive processes that engage the learner with their own priorities (Mezirow 1991 & Mezirow 2000; Kolb 2014; Brookfield 2006; Heron 1999; Coleman and Chiva 1992; Jarvis 2002; Rogers 2007; Rogers 2008; Tennant 2006; Foley 1995). It therefore includes heuristic learning, where individuals are engaged in exploring topics of importance and finding answers for themselves.

Therefore, when employers consider implementing LP approaches with their employees, they will need to use professionals in their training departments or consultants who can facilitate the process effectively. It is not about presenting Powerpoint slides or giving lectures. It is about truly engaging employees with their own learning and decision-making.

Put very simply, effective learning needs to involve ‘Head, Heart and Hands’. The reasons for this can be correlated with the way the human brain functions and decisions are made (Compton 2005; Hastings and Donald 1999). The higher parts of the brain (cerebral cortex) involve many processing sites, such as for thinking, the senses, and motor responses, which are then linked to other centres, such as the emotional centres of the brain, including the amygdala. Effective learning therefore requires the engagement of an individual’s emotions/feelings, thoughts, movements, and senses.

It used to be thought that decision-making was a purely rational and logical process (Stanovich and West 2000; Evans and Stanovich 2013). It has been demonstrated that any decision always involves both thinking and feeling processes. This may take place outside conscious awareness. An example of this is Myside Bias; for example, when individuals are asked to weigh the pros and cons of a particular issue, they add more pros to their personal preferences. This Myside Bias applies to people of all levels of intelligence and ability (Stanovich et al. 2013).

There are other factors that can influence the willingness or preparedness to learn. According to Peter Jarvis (2002), before learning takes place, a disjunction, or dissonance, is required in the psyche, which provokes the desire/motivation to learn something. Going through the learning process then reduces the discomfort of dissonance (Andresen et al. 2000; Boud 2004; Molloy and Boud 2014; Brookfield 2006; Chiva and Webster 1998; Loewenstein and Spletzer 1999; Rogers 2008). Also there are important biochemical processes associated with the psycho-neuro-immunity, which can impact on the learning process. Maybe this could be termed: the ‘happy learner’? When an experience is enjoyable, reassuring, and meets our needs, cells in the human body release important neurotransmitters or molecular messengers, called endorphins. Endorphins can be received by any and every cell in the body, including blood cells. When an endorphin molecule arrives at the receptor site of a cell, it triggers the cell to work more effectively and efficiently (Blalock et al. 1973; Baumeister and Finkel 2010; Ogden 2012; Pariante 2001; Wang and Shi 2014). The arrival of the endorphin molecule enhances cell function. This in effect makes the body–mind work more efficiently and effectively. If an individual is engaged in learning, and their body and mind work more effectively, then their learning will be greater.

To summarise, effective adult learning involves the engagement of the employee with topics of relevance to them, and learning strategies that involve the head, heart, and hands. Therefore, presenting information alone, without meaningful interaction, will be a completely inadequate form of education or learning. If the learner is motivated and their needs are being met they will be happier and this will impact on the effectiveness of the learning. This has implications for the provision of LP—concerning which training provider or consultant to use.

What Is the Role of the Employer in Supporting Life Planning with Employees?

Ideally, LP would take place across an employee's working career or life, from the initial appointment to a position within the employing organisation, right through the working career that the individual is with the company, until they leave. So that whatever the life circumstances or changes that impact on the employee, the employer makes appropriate LP provision available. With ageing workforces and the removal of the default retirement age in many countries, employers' strategies for negotiating and resolving dilemmas with employees become more critical. Linking longer working with LP provides an appropriate approach for the employer and employee. This has been evidenced by the positive effects of training directed at older workers. Flynn et al. (2008) have identified the benefits of linking training and education with longer working. Montizaan et al. (2014) indicate that employer-provided training particularly focused on older workers delays the age of retirement. This has also been confirmed in Italy by Battistin et al. (2013).

LP should include provision for the everyday 'normal life events', or normative expectations, which can be partly anticipated, such as a mid-career review, and pre-retirement planning. In Table 12.1, a programme/series of LP events/courses/learning is suggested. This enables an LP programme to be created and provided by employers, possibly supported by other organisations, such as employee's organisations, the charitable sector, and so on.

Post-work/later career planning and mid-post-retirement (LPA Research Hub 2015) takes place in most cases after an employee has left the workplace. However, some employers retain contact and a relationship with past employees. This relationship could include some post-career LP.

However, it may also be desirable to allow for provision which supports people managing unexpected changes or life events, such as negative stress/burnout, or consequences of divorce, or debt. In Table 12.2, some unexpected life events are identified, and suggestions made concerning ways in which they could be managed.

What Models Are Effective in Enabling Life Planning?

An effective decision-making model which incorporates an individual's emotional nature will work well. In relation to LP, a number of models have been specifically developed for LP and retirement. These include the Three Phase

Table 12.2 Ideal provision for managing 'unexpected' life events

Stage	Age	Topic	Purpose	Delivery method	By whom
Unexpected life events	Any age: can occur any time in a person's life	To introduce techniques and strategies by which individuals can manage the stress and strain of unexpected life events	To provide individuals with the tools to manage emotionally disturbing and unexpected life events	Most effective technique to support the employee	
Employee with severe stress reaction, burnout, or mental ill health	At any age: can occur, and at any time in life	To introduce techniques to manage stress and change the life pattern as necessary	Purpose: To enable an employee to review their lives and circumstances that produced the stress response	One-to-one talk therapy, small support group, mediation, anger management, exercise, checking diet and nutrition, checking drug use	HR, counsellors, mentors, skills trainers
Employee who is separating or getting divorced	Any age or stage	Purpose: To enable the person to manage the implications of separation and divorce on relationship, housing, finances, and family.		One-to-one talk therapy, small support group, mediation, debt counselling, anger management	HR, counsellors, mentors, skills trainers
Debt problems	Any age or stage	Purpose: To enable the person to manage their finances more effectively, so that the debt is reduced and the individual can move into financial liquidity		Debt counselling, small support group, mediation may be necessary, getting advice from Citizens Advice Bureau, money advice service or a financial adviser	Citizens Advice Bureau, money advice service or a financial adviser

(continued)

Table 12.2 (continued)

Stage	Age	Topic	Delivery method	By whom
Ill-health issue or impairment	Any age or stage	<p><i>Purpose:</i> To enable the individual with chronic conditions to maximise their health and recover from acute conditions</p> <p>To adapt to the workplace, within 'reason', to accommodate any impairment or longer lasting disability</p> <p>To consider alternative job roles. If ill health prevents working effectively and no other routes back to work are possible, then ill-health retirement may be an option</p>	Different methods for dealing with different stages of ill health	HR
Job loss/Redundancy	Individual in paid work	<p><i>Purpose:</i> To support the individual to regain employment, undertake appropriate retraining.</p> <p>To support the individual to manage their money and gain income.</p>	Job centres, mentoring, career guidance, identifying strengths and skills, job search groups	HR, jobcentre careers counsellors, mentors, outplacement consultants
Possible requirement for long-term care	Individual or dependant relative	<i>Purpose:</i> To identify forms of support possibly in residential accommodation that can meet the needs of the individual.	This issue as populations age is becoming more critical. There are costly implications of such care	CAB, mentors, bereavement counsellors, tax office, registrar
Bereavement	At any age	<p><i>Purpose:</i> to support the individual to manage their feelings and thoughts about the loss.</p> <p>To support the individual with the practical elements associated with the death of a relative, partner, or friend.</p>	Counselling and guidance, support group, money advice, manage emotions thoughts and feelings	CAB, mentors, bereavement counsellors, tax office, registrar

Model of Change by Bridges (2009), the Transition Curve and Managing Change models by Coleman (in Coleman and Chiva 1992), and Six Stage Model by Chiva (2011). The next section of this chapter examines a number of these models in turn.

William Bridges (Bridges 2009) Three Phase-Model of Change

Bridges suggests that any change involves three phases:

1. An ending phase
2. A neutral zone
3. A beginning phase

which overlap with each other (see Fig. 12.3).

An Ending Phase

This ending phase initiates the change process, because a way of life or an existing system is no longer useful or valid. Its underpinning concepts, attitudes, beliefs, processes, and components decrease in use and reliability, as the external situation and circumstances change. Aspects of the ending phase continue throughout and beyond the change.

Managing the ending phase involves:

- Identifying who is losing what
- Considering both primary and secondary losses and the people involved and how important this loss is to the people involved

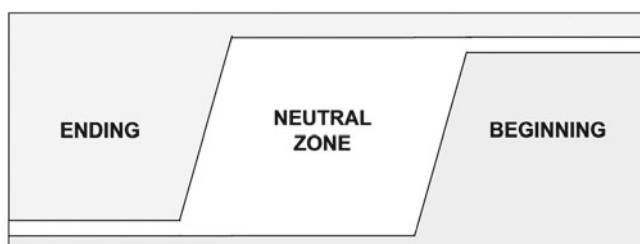


Fig. 12.3 Three phase model of change

- Being prepared for an ‘overreaction’ and acknowledging the losses and feelings generated.
- Honouring the associated grieving
- Identifying ways for self-reward and rewarding others which are real
- Keeping talking about the process—it can help shift awareness
- Identifying both the things that have been lost and the things that remain the same
- Identifying both the losses and the gains from the change
- Creating rituals for the things that have ended
- Respecting the past and the associated achievements
- Recognising the continuities

A Neutral Zone

In this phase, everything is unsettled. There are few set concepts: attitudes, beliefs, and values are questioned; systems and processes seem inappropriate; and there is uncertainty. Aspects of this uncertainty or searching continue throughout the change and beyond. Managing the neutral zone involves the following processes:

- Anxiety rises, old senses of failure re-emerge
- ‘Too much’ is going on
- A sense of vulnerability increases
- Extreme positions may be adopted
- Creativity and new ways of thinking may emerge
- New orientations, concepts, and positions start to emerge, though there is confusion
- Acknowledge and identify the newer ways of being
- Create temporary systems and ways of being for this interim situation, including short-term goals, ‘just for today’
- Maintain networks, connections, and support systems—when actually it feels like the last thing to do.

A Beginning Phase

This is the final phase of the model where newer concepts, attitudes, beliefs, values, systems, and processes are tried out and implemented, becoming more dominant and conscious. These will continue in dominance until the next

change (where they will then form part of the ending phase). Managing the new beginning involves the following activities:

- There may be uncertainty and resistance due to fear of getting on with the new
- Start to create images for the new
- Create a plan
- Involve other people in the plan
- Hold to the plan and goals, acknowledge and reward success.

Transition Curve Model—Coleman (In Coleman and Chiva (1992))

When a change takes place, as in Fig. 12.4, moving from Situation A to Situation B (like in Bridges' model), there is an experience of transition.

During that period of time, a whole range of thoughts and feelings can be experienced, as shown in Fig. 12.5, ranging from shock to guilt until, after a



Fig. 12.4 A transition

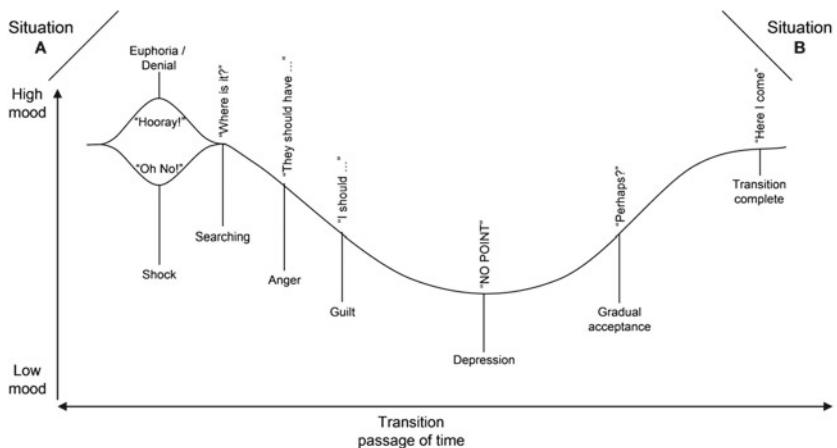


Fig. 12.5 Transition curve model

period of gradual acceptance, the transition is completed. The time taken to move from A to B can vary with the individual and the circumstances. This model is based on the work of Elizabeth Kubler-Ross (Kübler-Ross 2009) and Leonie Sugarman (Sugarman 1986). It has been described as the ‘loss’ or ‘bereavement’ curve or the ‘Heroes’ journey.

There are a number of stages included in the Feelings Curve:

- Shock—the feeling of being overwhelmed and not knowing what to do.
- Euphoria/Denial—the desire to reduce the problem by trivialisation, possible denial, and feelings of euphoria.
- Searching for meaning—the person attempts to gain an understanding of what has happened and why.
- Anger—‘they should have’ and blaming others.
- Guilt—blaming of oneself, and a lack of self-forgiveness.
- Depression or self-doubt—as awareness increases, conflicts between needs and feelings arise. These are suppressed resulting in depression.
- Acceptance of reality—letting go. Up to this point, the person has ‘held on’ to the past, and may lead to a period of testing—a period of experimentation in which new roles, behaviours, and lifestyles are ‘tested’.
- Transition Completed—a new lifestyle becomes integrated within the person’s concepts and beliefs and the process of transition is complete.

The model is representative rather than specific, so not all steps are necessarily experienced. A person may also get ‘stuck’ in a particular thought/feeling. The time taken to go through the thoughts/feelings during the transition varies enormously from seconds to decades. Difficulties can arise when people are coping with several changes at the same time. So it makes sense to arrange not to have too many changes at once, if this is possible.

An implication of this model is that people may experience strong emotions, which will need to be positively managed. The model provides a first step, which is an understanding that these feelings are natural and healthy. The next step is their management. Various techniques are available for both expressing feelings, reducing the impact, releasing them safely, and dealing with the origination (past and present) of thoughts/feelings.

Managing Change Model (Coleman and Chiva 1992)

This model integrates the decision-making process with the experience of transition, and the process enables people to identify the issue, their feelings about the issue, best options for resolution of the issue, making the choice, taking

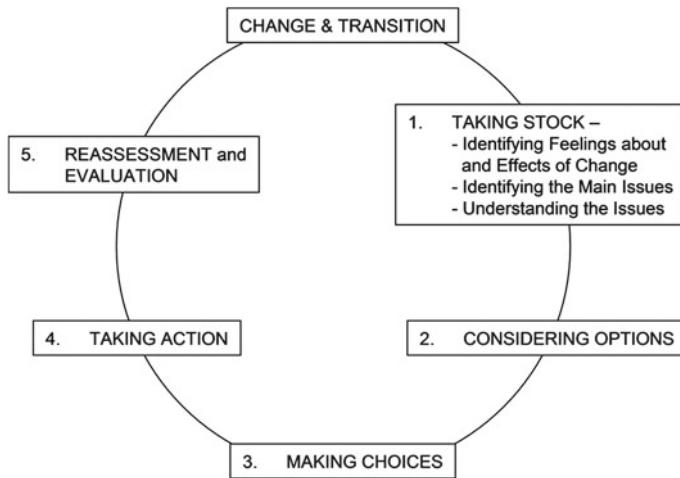


Fig. 12.6 Managing change model

relevant action, and then evaluating the effectiveness of the process. If needed, the process could be repeated for the same issue or another issue (Fig. 12.6).

The Integrative Life Planning Theory (Hansen 1997)

This model involves six major critical life tasks:

- (a) finding what needs to be done in changing global contexts
- (b) weaving lives into a meaningful whole (using the metaphor of a multi-layered quilt)
- (c) connecting family and work
- (d) valuing diversity and inclusion
- (e) managing personal transitions and organisational change
- (f) exploring spirituality, purpose, and meaning.

This model brings together the individual, their environment, and the socio-political context. As such, it is inclusive and developmental. I think it is a valuable model with which to work.

Six Steps to Successful Life Planning (Chiva 2011)

This is another six-step LP model which can be used to create an integrated and holistic life plan. Notice some of the steps of the managing change model

(Coleman & Chiva, 1981) have been integrated. This model is perhaps more complicated than models 3 and 4.

The six steps are as follows:

Step 1: PURPOSE

Step 2.1: Taking stock of myself and my situation

Step 2.2: IDENTITY

Step 2.3: Therefore: Who I Am!

What is important to me? How do I tick in this situation?

Step 3: CONSIDERING OPTIONS and making the BEST CHOICES

Step 4: BEHAVIOURAL INTENTION

Step 5: TAKING ACTION including action orientation and psychomotor skills

Step 6: REVIEW—Where have I got to?

Each step is accompanied by Core Questions (CQ).

Societal and environmental factors could arise in each of these areas, for example, in fulfilment or priorities—‘I want to give back to my community’ or ‘I realise I am not alone in this world and care needs to be taken with what is around me and how I relate to it’. Each step will now be briefly discussed in turn.

Step 1 Purpose involves understanding the implications and impacts of higher consciousness, the need for fulfilment, values, priorities, and the person’s life mission on their LP.

Higher Consciousness means a level of awareness outside oneself and connected with wider aspects of the universe. This level provides higher intuitive guidance (Soskin 2012). CQ—What is my place in the universe? What perceptions/intuitions do I get? What would I like to achieve at the highest level? This is the transpersonal psychology aspect.

Values are the things, concepts, or attitudes given importance by the individual in their life. CQ—What are the principles and values by which I live?

Fulfilment refers to aspects of life that give deep satisfaction, happiness, or joy.

CQ—What in my life gives me fulfilment, joy, or happiness? (Seligman 2002).

Prioritises aspects of life that are given the highest importance. CQ—What is most important to me?

Mission is the overall purpose in life. Considering your main roles, CQ — What are the key things you are really about? Stephen Covey et al. (1994)

suggest up to seven main roles, and to identify three key purposes for each. For example, role 1 is the breadwinner who supports family, provides security, and allows 'treats'.

Step 2

- 2.1 Taking Stock of feelings, issues, and understanding. CQ—How do I feel about this change? Write down the feelings. Are the feelings positive, negative, or neutral? Have other feelings been triggered? What are they? (Krathwohl et al. 1964). CQ—What are the issues for me? What issues do I have about this? (Jeffers 1987) CQ—How does the environment in which I find myself impact on these issues? (home, work, economic, political, community, etc.). CQ—What do these issues mean to me? What understanding do I have of these issues?
- 2.2 Identity: Identity includes some core components—self-esteem/self-concept, motivation, self-efficacy, self-reliance and agency, personal attitudes and beliefs.
- 2.2a. Self-esteem. CQ—How confident do I feel on a scale of 0–10? If your score is less than 6, you may want to enhance your self-esteem. Think about the things you have done well in your life—these are self-esteem builders.
- 2.2b. Beliefs and attitudes. CQ—What are the main ways I think about the issues identified in 2? What are my preferred ways of relating to these? What do important people around me think about these things?
- 2.2c. Motivation CQ—How motivated or how much energy will I put into this issue in my life?
- 2.2d. Self-efficacy/Agency CQ—How able do I feel to achieve actions in the world? And how able do I feel to achieve the specific actions required? This includes positive psychology. (Antonovsky 1996).

Step 2.3 Who I am! What is important to me! How do I tick! The fourth level of factors involves considering CQ—Who am I and what makes me tick?

This is really an integrative step linking together the personal understanding from Steps 1–3, and will take into account normative impacts and changes in society.

Step 3 Managing Change: Considering Options and Making Choices

- 3.1 CQ—What are my options for managing this change? List the options in detail.

- 3.2. CQ—What impacts do the environment and context have on the options and choices?
- 3.3. CQ—What is the best choice for me?
- 3.4. CQ—How will I decide? (What are my values? Does the option relate to these? What are my overall attitudes to this? Does this accord with my mission in life or my priorities? What do I think other people may say if I do this? Will this affect my motivation? What additional information, advice, or guidance do I need?)
- 3.5. CQ—How confident do I feel in putting this choice into action? (Will this enhance my self-esteem; can I maintain the momentum and positive thinking required? Do I think I can complete the task according to my priorities?)
- 3.6. CQ—What will motivate me to complete this task in terms of fulfilment? When will I know I have achieved this?

Step 4 Behavioural Intention

In psychological terms, behavioural intention derives from cognitive information processing, which takes into account the thoughts concerning future action. A significant impactor on this intention is normative belief (including peer pressure) (Tones, 1984).

The responses to the questions in the previous step lead to an intention to act or behave in a certain way. As we know, intention does not equal action. This activity is based on health psychology.

- 4.1. CQ—What factors will make this behaviour more likely to take place? How do I enhance these?

Step 5 Managing Change: Taking Action Including Action Orientation and Psychomotor Skills

- 5.1. CQ—What are the best ways to take action?
- 5.2. CQ—What resources do I need?
- 5.3. CQ—What are the most appropriate skills to use? Have I got these skills? Can I develop them? Or do I need help? (Chiva 2011).
- 5.4. To sum this step: What needs to be done? By when? By whom? Where? What will it look like? How will I reward myself for its completion?

Step 6 Review

- 6.1. CQ—What progress have I made in taking these actions?

- 6.2. CQ—What do I still need to do to complete the actions successfully?
- 6.3. CQ—Where do I need to go from here? Do I need to return to other steps in the model? If so which ones?

Summary of Six-Step Life Planning Model

The LP model involves the managing change process, building in the requirement to use the dimensions of higher consciousness and intuition, and other internal variants which are often the drivers to success in managing change.

How can the model be applied across the life course? In a spiral curriculum, an individual will revisit their LP at different ages and stages, and similar processes are used on each occasion. This LP model is generic so it can be applied by an individual for any aspect of LP. If a themes of change approach is considered (such as money, use of time, relationships, health), then the aspects of these relevant to the individual will be explored at each age or stage (Table 12.3).

To summarise: LP models come in different ‘shapes and sizes’. Some are simpler and some more complex. A model that captures the important aspects of making decisions, including an emotional dimension, will be more effective. One of the advantages of providing a model for employees undertaking LP is that they can refer to the model later when they have a need to resolve an issue.

Pathways into Retirement

Morrell and Tennant (DWP 2010) undertook research investigating different pathways into retirement and the relationships employers had in the process of retirement decisions. The findings were interesting, and identified the importance of: good employer–employee relationships; appropriate provision of information; positive communications about retirement, redundancy or remaining in work; and a clear explanation of the process of the ‘right to request’ remaining in work.

Benefits of Life Planning

It is probably worth just identifying some of the potential benefits to the key stakeholders involved in providing and receiving LP.

Table 12.3 Working life—one example

Working life—one example		Pre-career	Early career	Mid-career	Later career/ pre-retirement	Retirement	Notes
Paid work							
Education/training	School/college/university Apprenticeship/internship	On-the-job training					
Unemployment	Training new job role		3 months		6 months at 59		
Redundancy					Out of work		
Job change		First job	New job	No job			
Extending working life							
Life planning							
Retirement							
Semi-retirement							
					Retired on low income		
						No job and looking for work	

A number of potential benefits are received by the employer. For example: employees are better able to manage change in the organisation; have greater ownership of financial and non-financial outcomes, requiring less employer-paid support; performance in the workplace is improved; and there can be positive effects on corporate image. For the employee, potential benefits include the ability to: recognise personal and life stage goals, think ahead (for example, to take timely action in terms of health, finance, relationships, use of time, and to recognise when individuals might need to seek advice), and manage the process of life change, gain a sense of control and become empowered to better cope with, and recover from, adverse events and life course transitions. Finally, for the community, LP can provide benefits related to understanding the changing ethos of society, acknowledging active citizenship (for example, putting something back, voluntary work), and understanding the value of social contact. LP might also contribute to lifelong and life-wide learning, improved financial awareness (for example, pensions and budgeting, and improved awareness of health and social care needs). LP also recognises the changing nature of work and encourages the engagement of citizens.

Some Factors Impacting on the Provision of Life and Retirement Planning

The complexity of life and retirement planning, and remaining in work, is greater than that already identified. One of these complexities involves the size of the company and the economic climate. Larger companies tend to provide more training, including life and retirement education. Small and medium-sized enterprises are often more restricted in their provision of training. This can impact on the facilities available for employees in terms of making retirement decisions.

The impact of the economic situation on the provision of training is well-known. When the economy is good companies tend to provide more training, and when the economy is challenged, and profitability seems lower, companies make savings. These savings are often in the form of provision of only essential training. Training or educational provision, such as life and retirement planning, would therefore be a topic that could be 'dropped off' the training menu, when financial resources are more restricted.

LRP is usually relatively low on the priority list of subjects or topics in companies. When it is provided, the length of time given to the provision has often been reduced over previous levels. For example, some courses used to be as long as four days in the 1970s and 1980s (the Netherlands had five-day

mid-life and pre-retirement courses), and two days were more typical in the UK. At the present time, many organisations provide PRE in a half-day or a one-day course. This level of provision is unsatisfactory and insufficient, unless supported and integrated with other educational/learning strategies.

Current Trends in Work and Retirement

HSBC (2015) suggests that the reality of retirement is changing and transforming. This was identified by Phillipson as described earlier. Semi-retirement, or reduced time spent in work, is becoming more widespread. More than a fifth (22 per cent) of retirees have been through a period of semi-retirement before full retirement; and over half (56 per cent) of working age people are planning to semi-retire before they fully retire. This trend is a somewhat contrary trend to the intentions of most European governments which are encouraging people to work longer.

Currently, there are sociocultural differences concerning older workers and longer working. Often it is the more wealthy and professional/highly skilled older workers who are in a better position to remain in work and perhaps also more likely to semi-retire. This has been evidenced by McNair et al. (2013). The implications for employers are that the expectations of older workers will vary depending on their financial status and need for income generation, enjoyability of the work, enjoyability of the workplace and colleagues, family commitments and caring roles, health and well-being status, life purpose, and plans in relation to how to spend their time. These factors are drivers for remaining in the workplace or leaving it (McNair and Flynn 2006; Owen and Flynn 2004; Flynn 2014; Flynn et al. 2008). Matt Flynn (2014) has developed a Work and Retirement Diagnostic Tool which can enable employers to determine the intentions and preferences of their employees. Based on the answers to the questions in the Diagnostic Tool kit, a summary can be produced for the employer, which the employer can use to guide policy, strategy, relationships with employees, and extending working life.

The employer therefore will find diverse requirements from different employees, and therefore the need for a policy that covers the range of implications and requirements for flexibility in employment patterns. This flexibility includes the possibility of part-time working, flexible hours, core hours, periodic work, semi-retirement, phased retirement, and consultancy. This could be perceived as putting demands on the line managers and team leaders, and HR, if available.

For younger age cohorts of workers, there are different expectations of the working life, and consequently of LP, the need to work longer, and longer working.

Conclusions

In this chapter, the working life and LP have been considered. The chapter has created a range of frameworks to support an employer in identifying possible LP provision. The relationship between LP, the life course, and the working life was explored. The case for employers supporting their employees, when the employees are managing significant unexpected life events, has been described. The chapter then considered the nature of effective learning and facilitation. A number of models that could be adopted in LP programmes have been outlined. Additionally, the need to integrate training and development, LP, appraisals, career development, and health promotion in the workplace is considered a priority.

In this chapter, a review has been undertaken of the current theoretical and research evidence concerning:

- the nature of LP,
- retirement and factors impacting on retirement decisions
- what is LP
- why may LP be helpful
- educational approaches to LP
- developmental models of LP
- possible LP interventions by age and stage.

It is also worth noting that there is more research that could be undertaken to validate how some of the provision suggested impacts on employees and their families' lives. There is extensive research evidencing that both financial and non-financial pre-retirement education enhance retirees' quality of life. Research could also be undertaken on the impact of integrated strategies on the organisation, employees, and effectiveness.

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Part III

Younger Workers

13

Millennials in Canada: Young Workers in a Challenging Labour Market

Eddy S. Ng, Sean T. Lyons, and Linda Schweitzer

Introduction

The cohort of young workers born between 1980 and 1995 has been given a wide range of labels by various authors and commentators, including “Millennials” (Strauss and Howe 1991), “Generation Y” (Johnson and Johnson 2010), “Gen Me” (Twenge 2006), “Nexters” (Zemke et al. 2000), “the next great generation” (Howe and Strauss 2000), and the “nexus generation” (Barnard et al. 1998). In recent years, they have earned an unfortunate new moniker: “generation screwed” (Girod and Shapiro 2012). This epithet conveys an image of a generation facing an uncertain future with bleak prospects of quality permanent employment, rising levels of personal debt, and an inability to maintain the quality of life afforded by their parents (Carbone and Cahn 2014). The current narrative in the mass media and popular press suggests that despite high levels of education and technological skills, Millennials across the developed world are plagued by high levels of unemployment and underemployment (Foster 2012). If this characterization is correct, persistent

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high unemployment rates could create social and economic problems such as long-term (structural) unemployment, widespread low-quality jobs, and a loss of confidence among young workers (ILO 2013).

Unfortunately, few studies in the management literature have examined the impact of real and perceived labour market challenges among Millennials. Extant research has tended to focus on how Millennials differ from previous generations in their work values and attitudes (Loughlin and Barling 2001; Parry and Urwin 2011; Smola and Sutton 2002; Twenge 2010; Twenge and Campbell 2012; Twenge, Campbell et al. 2010), career expectations and aspirations (De Hauw and De Vos 2010; Ng et al. 2010), and their work-related behaviours and outcomes (Lyons et al. 2012a; Ng and Burke 2006; Westerman et al. 2011). Yet, as the research concerning the millennial generation continues to evolve, it is important to focus our attention on the confluence of their career expectations, experiences, and outcomes (Lyons et al. 2014a). Despite the hope and optimism surrounding the millennial generation (Harris 2013), research shows that they encounter difficulties in launching their careers (LaRochelle-Côté 2013), particularly in contrast to their Baby Boomer parents (Lyons et al. 2014b). The Millennials' "failure to launch" may suggest that their aspirations and expectations are colliding with labour market realities (Carnevale et al. 2013).

The purpose of this chapter is to provide a brief overview of the Millennial generation, who constitute the current crop of "young workers," and to examine the social and economic conditions they face as they launch their careers and proceed through their early career stage. We begin by first describing Millennials as today's young workers, within the context of their place in the birth cohorts or generations. Next, we review empirical evidence with respect to their attitudes, work values, and career expectations. We then discuss the labour market challenges faced by Millennials and their implications. We conclude with a discussion of the prospects and prescriptions for managing the Millennial workforce. Given our expertise, we also focused our chapter on North America in general and Canada in particular. However, the trends for young workers are similar to those in other advanced developed economies such as Australia, the UK, and the USA (Allison 2013; ILO 2013).

Millennials: Today's Young Workers

As a generation, Millennials have received a lot of attention from both academic research and popular press books (Deal et al. 2010; Howe and Strauss 2000; Ng et al. 2012; Parry 2014). The conceptualization of a "generation" is

rooted in Mannheim's (1952) theory of generations, which suggests that people born within the same socio-historic context share common experiences and memories that forge commonalities in their values, attitudes, preferences, and behaviours (Lyons and Kuron 2014; Parry and Urwin 2011). Although different researchers vary in the birth year boundaries that they use to demarcate the millennial generation from the generations that precede and follow it, the exact boundaries of a generation are a matter of mere speculation, as the continuity of births and deaths within a society and the varying impacts of formative events on young people make precise boundaries implausible (Mannheim 1952). However, for the purpose of analysis, it is necessary to draw a tentative boundary somewhere (Parry and Urwin 2011). For the purposes of this chapter, we adopt the commonly employed boundary of 1980 to denote the start of the millennial generation (Howe and Strauss 2000; Taylor 2014). There is much less agreement on a tentative end-date, with some suggesting that it coincides with the advent of the Internet in 1994 (e.g., Johnson and Johnson 2010; Lyons et al. 2014a), some arguing that the turn of the millennium is the significant marker (e.g., Lancaster and Stillman 2002; Zemke et al. 2000), and others refusing to speculate and merely defining Millennials as all people born in or after 1980 (e.g., Taylor 2014). Regardless of the definition one adopts, Millennials represent the bulk of today's young workers. Official sources indicate that Millennials make up 23.6 percent (74.3 million) of the population in the USA (U.S. Census Bureau 2013) and 27 percent (9.1 million) in Canada (Statistics Canada 2011b).

Research and popular writing on generational differences has grown steadily since the early 1990s when Strauss and Howe's seminal work *Generations* was published. Over the past two decades, the notion of generations and the popular labels of generational cohorts (i.e., Baby Boomers, Generation Xers) have become engrained in the collective consciousness. By the time the earliest Millennials reached adolescent years, there was already much speculation about this generation and what they would be like as young adults. The popular narrative suggests that the millennial identity has been forged by a complex set of social, economic, and technological influences, including affluent and highly engaged parents, globalization of culture and commerce, environmentalism, educational reform and rising levels of post-secondary education, rapid and deep technological change, and the changing nature of the employment relationship (Howe and Strauss 2000; Johnson and Johnson 2010; Lancaster and Stillman 2002; Twenge 2006; Zemke et al. 2000).

By far, the most common attribution of Millennials is that they are the product of over-indulgent "helicopter parenting" (Twenge 2006). Millennials are depicted as the beneficiaries of a comfortable middle-class upbringing,

provided by their Baby Boomer parents who are portrayed as hard-working, and as a result, more socio-economically affluent than preceding generations (Gillon 2004; Owram 1997). Having benefited from the “great prosperity,” an unprecedented post-war boom in the developed world (Reich 2010), Boomers are said to have had greater resources to provide to their Millennial offspring, and they adopted a very involved style of parenting that focused on their children’s self-esteem above all else (Casamassimo et al. 2002; Goodman 2012; Twenge 2006). An emblematic example of this parenting style is the “participation ribbon,” a symbol of the trend away from winners and losers in children’s sporting activities in favour of rewarding every child for participating (cf. Alsop 2008). The popular narrative also suggests that Boomer parents instilled in their Millennials children values of optimism and high expectations, arguing that they should follow their passion and that they can achieve anything they want as long as they put their minds to it (cf. Fortune 2007; Goodman 2012; Newport 2013). The supposed outcome of this lofty parental encouragement is that Millennials became spoiled, self-centred, and entitled (Howe and Strauss 2000; Twenge 2006). The Millennial generation also has had higher levels of educational attainment (i.e., college and graduate degrees) than past generations, with 68 percent of Canadians aged 25–29 having a post-secondary degree, up from 43 percent in 1981 (Galarneau et al. 2013). Therefore, it is no surprise that Millennials have been found to hold high expectations for their futures and careers (Ng et al. 2010; Twenge and Campbell 2008a). There is some evidence to suggest that certain elements of this popular depiction of Millennials are not unfounded. Using time-lagged, empirical data (i.e., cross-temporal meta-analyses or CTMA), Twenge and Campbell (2008a) tracked personality and attitude changes among high school students from the 1930s to 2000s in the USA. They found that self-esteem levels are on the rise, peaking with high school students (i.e., Millennials) in 2006. Millennials were also found to be more satisfied with themselves and scored higher on selfliking, but also indicated lower self-competence, suggesting greater positive self-views which were not accompanied by greater levels of competence (Twenge and Campbell 2008b). Lyons and Kuron (2014) further reviewed evidence of personality and attitudinal changes in the literature, and concluded that self-confidence, self-assuredness, narcissism, and neuroticism were all on the rise with the Millennial generation. Researchers have speculated that these differences are the product of the Boomer parenting style, which encouraged children to be assertive and to question everything (Twenge et al. 2008), and also the rise in the use of social media (e.g., Facebook, MySpace), which contributes to positive self-views and self-enhancements among Millennials (Barker 2012; Gentile et al. 2012).

The outcome of these influences, it is argued, is a strong sense of entitlement among Millennials, which is not accompanied by performance (see Twenge and Campbell 2008b). For example, Hill (2002) noted that, as students, Millennials frequently complain about a “B” grade after spending an entire weekend writing a paper. The tendency to equate effort with performance has led Hill to coin the term “ability-performance nexus.”

Millennials are also said to have been influenced by large-scale trends such as globalization, increasing diversity, and rapid technological change (Burke and Ng 2006; Lancaster and Stillman 2002). The globalization of world markets, including the labour market, has resulted in greater immigration of workers across continents and oceans (Castles 2002). The result is greater ethnocultural diversity. In Canada, for example, over one-third (34 percent) of youth (aged 15–24) were born to parents who were themselves born outside of Canada. This is in comparison to 25 percent in 1971 (Galarneau et al. 2013). Historically (prior to 1960s), immigrants to Canada came from Europe and the USA, but Asia and the Middle East are now the principal sources of immigrants, contributing to the diversity among young Canadians (Chagnon 2013). Consequently, Millennials are more likely to have gone to school with others who are racially or culturally diverse, and to be exposed to messages of diversity and inclusion. This generation has also seen a greater number of women in the labour force in comparison to previous generations, especially in professional and managerial positions (Ng et al. 2014). As a result, they are said to hold more egalitarian attitudes towards women and minorities (cf. Ng and Wiesner 2007).

The technological advances of the late twentieth and early twenty-first centuries are another critically important formative influence ascribed to the millennial generation. Tapscott (2009) argued that information technology, combined with social media, has created a generation that thinks, communicates, interacts, and works differently than all preceding generations. The result, he argues, is that Millennials are more demanding of freedom and customization, authenticity and integrity, collaboration, excitement, and speed.

Millennials’ Work Values, Attitudes, and Career Expectations

Millennials are also said to approach their working lives differently than previous generations did. Specifically, they are thought to demand rapid feedback, respect, and equality from all their coworkers, social interaction, advancement opportunities, work-life balance, flexibility, and meaningful work (Johnson

and Johnson 2010; Lancaster and Stillman 2002; Zemke et al. 2000). Research has investigated these claims by examining intergenerational differences in work values, which are aspects of work and work-related outcomes that are most important to those individuals (Lyons et al. 2010). Work values are generally predictive of the types of work and career preferences individuals make (see Ng and McGinnis-Johnson 2016). Following Lyons et al. (2010), extrinsic work values refer to material aspects of work, while intrinsic values relate to inherent psychological satisfactions with work. Social values concern working relationships with others, while altruistic values reflect a concern for others. Twenge and colleagues, again using CTMA, reported that, compared to previous generations of young workers, Millennials express greater preferences for leisure over work, and extrinsic rewards (e.g., money, status) over intrinsic ones (e.g., interesting work) (Twenge et al. 2010; Twenge et al. 2012). Furthermore, Millennials also reported lower altruistic values (e.g., helping behaviour and a concern for others) than Baby Boomers (Twenge et al. 2012), contradicting widely held beliefs that Millennials have a strong desire to “solve world problems” and save the world (Campbell 2008; see Ng et al. 2010). In this regard, recent findings suggest that Millennials are willing to trade-off social responsibility concerns for extrinsic rewards at work (Leveson and Joiner 2014). Twenge et al. (2010) also noted that social values (i.e., making friends) among Millennials are lower than their Boomer parents given greater use of technology (e.g., social media) in connecting with others. The implication for this is a lack of social and interpersonal skills necessary for job search (Gursoy et al. 2008). Although Twenge et al.’s (2010) CTMA evidence is the most compelling to date, reviews of the evidence suggest there is a lack of consensus in the extant research about the precise differences (or lack of differences) between the work values of Millennials and previous generations (Lyons and Kuron 2014; Parry and Urwin 2011).

In a study which compares the work values of Millennials and Gen Xers, Krahn and Galambos (2014) found that Millennials place greater emphasis on extrinsic rewards and have stronger job entitlement (i.e., a belief that higher education should be rewarded with well-paying jobs) than their Gen X counterparts. Ng et al. (2010) found that Millennial job seekers similarly report inflated expectations with respect to their pay and career advancement. Specifically, two-thirds of the Millennials surveyed expected promotion within the first 15 months in their first job. They also expected a 63 percent increase in salary within five years of employment. It should be noted that the average salary increase is 1–3 percent per year or 5–15 percent cumulative over five years (Conference Board of Canada 2014). Perhaps most surprising is the fact that the study did not find any relationship between salary and advancement

expectations with academic achievement. This discovery is consistent with Hill's (2002) ability–performance nexus indicative of a sense of entitlement which is not accompanied by ability. The strong sense of entitlement observed, and high expectations for their careers, may contribute, in part, to perceptions of their lack of labour market success (e.g., Kolm 2013), which may in turn, explain their lower levels of satisfaction with their careers, incomes, advancement opportunities, and recognition (Lyons et al. 2012a).

Labour Market Challenges and Opportunities Facing Millennials

The current media narrative surrounding Millennials as young adults suggests that they are stuck in a post-education quagmire, unable to reap the benefits of their education, are unemployed or underemployed, racked with student debt, and have generally “failed to launch” their careers (Carnavale et al. 2013; Foster 2012). Stories abound of educated but disenfranchised Millennials who have had to accept less than ideal employment, lower pay, and fewer benefits (PriceWaterhouseCoopers 2011), accept unpaid internships to gain work experience or to just “get a foot in the door” (Sagan 2013), or return to school and accumulate more student loan debt (Kolm 2013). The combination of poor labour market outcomes, rising housing prices, and rising debt levels have created a phenomenon of Millennials “boomeranging” back to living with their parents and delaying marriage and starting their own family (Gill et al. 2014; Taylor 2014; Thompson 2012). Additionally, the value of higher education (attending colleges and universities) has been questioned as Millennials struggle to find work that matches their skills and abilities (Kolm 2013; Maclean's 2013). The result has been a mismatch of skills and significant underemployment and employment instability for the overeducated Millennials, particularly in advanced developed economies (ILO 2013; LaRochelle-Côté 2013).

Although economic downturns affect workers of all ages, the impact on younger workers is particularly acute (Bell and Blanchflower 2011; Choudhry et al. 2012). Indeed, the “great recession” of the late 2000s had a profound effect on the economy and job opportunities for youth in many developed countries (Reich 2010). In Canada, for example, youth unemployment (i.e., unemployment among those aged 15–24) rose to over 15 percent in 2009, compared to 8.3 percent for all workers (Statistics Canada 2014). This can be compared to pre-recession rates of 6 and 11.2 percent in 2007 for youth and all workers, respectively. Recent evidence shows that youth unemployment rates in 2013

stood at 14.3 percent in Canada, 16.2 percent in the USA, and were much higher in European countries such as Finland (17.8 percent), UK (21 percent), Italy (35.3 percent), and Spain (53.2 percent) (OECD 2013).

It is important to note, however, that youth unemployment is categorized to include those aged 15–24 and has historically been much higher than that of the general labour force. In addition, even during this last recession, unemployment rates remained around the average (average youth and all-worker unemployment rates since 1976 are 8.4 and 14.2 percent, respectively) and well below the rates achieved during the recession of the mid-1980s (12 percent for youth and 19.2 percent for all workers in 1983—when the late Baby Boomers and early Gen Xers were graduating from high school and post-secondary education).

Data from the most recent economic downturn corroborates historical findings that employment for young people does not return to pre-recession levels (Bernard 2013). During an economic downturn, young workers are more likely to be laid off first, since it is less expensive for employers to replace a recent hire than an older, more experienced worker (Bernard 2013). Even after an economic recovery, young workers are less likely to be recalled or find full-time employment as a result of hiring freezes and slow job growth (Choudhry et al. 2012). Economists use the term “wage scar” to refer to a long-term pay penalty as a result of initial spells of unemployment. Thus, youth experiencing early unemployment may experience a wage scar to the magnitude of 13–21 percent (Gregg and Tominey 2005). High youth unemployment rates could, in turn, lead to social and economic costs such as long-term (structural) unemployment, widespread low-quality jobs, and a loss of confidence among young workers (ILO 2013).

In addition to the great recession, a number of other factors conspire to create unique challenges for Millennials as they work to attain security and stability in the labour market. First, the nature of the employment relationship has shifted over time, with increased mobility and self-direction in careers (Lyons, et al. 2012a). Millennials are also entering the labour market when organizations are taking steps to reduce labour costs (e.g., through technology or outsourcing). As such, jobs are less secure and stable and individuals are required to take more risks and actively seek opportunities for advancement and development. For example, Lyons et al. (2012a) tracked careers across four generations, and found that Millennials reported an average of six job and organizational changes by the time they reached 30 years of age, compared to an average of just three job and organizational changes for each of Gen Xers and Baby Boomers.

Second, the educational requirements of labour market success have shifted. Technological advancement has changed the way we work, requiring less unskilled labour, and increasing the demands for a highly educated “knowledge” workforce (Pokurat 2013). According to recent census data, the proportion of adults aged 25 and older holding a bachelor’s degree or higher is now greater than 30 percent in Canada and the USA, with close to a third of younger people (aged 25–34) in both countries having degrees in comparison to just over a quarter of people aged 55 and older. Greater levels of education have delayed entry into full-time career jobs (Galarneau et al. 2013), resulting in more part-time, temporary work or unstable work for youth and increasing the age at which they leave their parents’ homes.

Third, the age of retirement has been increasing over time, dampening the demand and opportunities for new workers (Carriere and Galarneau 2012). This is due to a combination of increased life expectancy, market instability, more knowledge work (less physical labour), relaxation of mandatory retirement, and the centrality of one’s career to one’s life (no motivation to retire). Despite concerns that Baby Boomers are exiting the workforce in large numbers, recent financial market decline has necessitated that older workers continue working past the traditional retirement age (Conference Board of Canada 2011). Older workers may also stay in the workforce longer because of changes in public policy (e.g., elimination of mandatory retirement age), employer accommodation of older workers (e.g., through technology and scheduling), and for work enjoyment reasons (cf. Ng and Law 2014). The recent recession has also served to delay the retirement of older workers, which prevents Millennials from entering the labour market and establishing themselves (Hawkins et al. 2014; Galarneau et al. 2013). In addition, as the demand for unskilled or low-skilled job decreases in the knowledge economy, older unskilled workers occupy the casual and entry-level jobs usually reserved for youth. However, as growth in the labour market slows down over time, the effect of delayed retirement is expected to decrease (Carriere and Galarneau 2012).

Future Prospects and Prescriptions

The forgoing discussion suggests that the current economic climate is a challenging one for many workers, especially Millennials, who are working to gain a toehold in a tenuous labour market. There are a number of ways that Millennials can adapt to these challenges. The first option is to return to school. However, higher education may not be a prescription in itself. Those

Millennials who possess the skills and training to capitalize on current labour market shortages are in the best position to secure a strong future for themselves. Research indicates that Millennials who returned to trade schools after earning a university degree are more successful at finding work and earning decent wages (Kolm 2013; Sorensen and Gillis 2013). The challenge may be in convincing Millennials (and their Boomer parents) to let go of the prestige and materialistic rewards (e.g., money and status) associated with professions requiring a university degree, and to enter into skilled trades, where labour demands are increasing (Nikravan 2014). In Canada, for example, the demand for trades is so great the government has put in place a foreign skilled worker programme which de-emphasizes university education (in contrast to its points programme for professionals) to attract skilled workers such as welders and electricians (Sorensen and Gillis 2013).

Apart from returning to school (trade school or graduate education), Millennials may seek entrepreneurial opportunities and start their own businesses. In a U.S. Chamber of Commerce (2016) report, one-half to two-third of Millennials surveyed are interested in entrepreneurship. More than a quarter (27 percent) of Millennials are already self-employed in growing segments of the economy, such as technology and innovation where Millennials are “digital natives” (PriceWaterhouseCoopers 2011). Furthermore, Millennials are able to tap into their creativity and multitasking abilities, and at the same time, provide employment for themselves. However, a key complaint about Millennial entrepreneurs is their lack of engagement in business interactions (as a result of multitasking and digital communication) (U.S. Chamber of Commerce 2016). In this regard, Millennials will need to develop better communication and interpersonal skills, which are necessary for interactions with customers.

As multinationals expand globally, international experiences will also be invaluable for Millennials’ career advancement and in the fulfilment of their career goals and preferences.

A third option is for Millennials to relocate internationally to economies where the skills that they possess are in greater demand. Globalization presents new career opportunities for Millennials seeking a global career. Individuals tend to emigrate when they are younger and in prime working age or as children of immigrants (Statistics Canada 2011a). As the most diverse generation, Millennials benefit from the experience of interacting with diverse ethnocultural groups at an early age, which contributes to a more tolerant and global mindset (Tung 2014). Millennials are also more likely to be self-initiated expatriates as they have studied abroad and may return to their country of education to work (Porschitz et al. 2012; Tung and Lazarova 2006). Consequently,

they are better equipped to deal with linguistic and cultural differences than past generations, making them uniquely suited to take on international assignments or to pursue career opportunities abroad. As multinationals expand their operations abroad, particularly to developing economies, they face the challenge of managing their overseas subsidiaries. Likewise, even when jobs are being “offshored” or outsourced overseas, the demand for skilled workers will continue to exist. However, much of the workforce in developing countries, such as Mexico, Indonesia, Nigeria, and Turkey (or MINT), lack professional and managerial talents. Thus, globalization has created a demand for a highly trained and educated workforce, presenting new opportunities for Millennial workers (see Burke and Ng 2006). In a PriceWaterhouseCoopers (2011) survey of Millennials from around the world, 71 percent of the respondents indicated a keen interest in working abroad. In the same study, 53 percent also indicated that they are willing to work in a developing country such as India or China. In this regard, the role of language and international business training will be important in preparing Millennials to position themselves to take advantage of global career opportunities.

This option presents its own challenges, which may make it undesirable to many Millennials. Taylor (2014) notes that Millennials who return to their parents’ homes in adulthood tend to favour this closeness with their family and seek to maintain a “stay-at-home” lifestyle even as they age. It may be challenging for many Millennials to break ties with their close-knit family units to live and work abroad. Another barrier relates to integration into a new culture. Even in Canada, a nation known for its high immigration rates, many first-generation immigrants, who are racial minorities, also face additional barriers in the form of discrimination in the labour market. Despite impressive education levels, many young immigrants have been unable to find employment in their trained professions (Haq and Ng 2010; Ng and Sears 2010). Consequently, many are left underemployed (e.g., engineer driving a taxicab), which represents a “brain drain” for the immigrants’ country of origin (frequently a developing nation), and a “brain waste” for the immigrants’ country of residence (a developed nation) (Macklin 2016; Tung 2008). The most common reasons cited for the poor labour market outcomes for Millennial immigrants include language barriers, unfamiliarity with “the Canadian way,” a lack of recognition of foreign credentials and work experience, and disparate performance standards (Chand and Tung 2014; Conference Board of Canada 2004).

A number of observers have noted that youth unemployment has historically been high and it will decline as the cohort ages (e.g., Bernard 2013; Galarneau et al. 2013). As the economy recovers and the Baby Boomers

retire, organizations will have to compete for today's Millennial workers. In this regard, existing human resource policies and practices developed by Baby Boomers may be outmoded. Employers will have to grapple with how best to manage a generation of workers who exhibit high levels of self-esteem, have a strong sense of entitlement, and form high expectations for themselves. The 2008 economic recession may have helped dampen the sense of entitlement and career expectations Millennials hold. As a generation that is much more educated and technologically adept, Millennials are highly equipped to deal with new economy jobs and in emerging fields. Millennials' experiences with youth unemployment may also prepare them for the changing nature of work, where employment is punctuated by periods of retraining and retooling (Velazquez 2010; Yoong and Huff 2006), and long-term permanent employment is no longer the norm (Burke and Ng 2006).

At the same time, employers will need to be responsive to shifting attitudes, work values, and expectations among a new generation of workers (Lyons et al. 2012a). As a generation that is ambitious and impatient to succeed (Ng et al. 2010), advancement opportunities will come when the Boomers vacate their senior management positions and make room for Millennial leaders. At the same time, employers should also review their performance management systems, and provide coaching and recognize achievement when organizational and personal goals are attained. Expectations regarding performance should be communicated in order to avoid the ability–performance nexus problem. This is particularly important for a generation that desires constant feedback and a high need for praise (Twenge and Campbell 2008a; see Ng et al. 2010).

Furthermore, in order to help develop a pipeline of leaders, employers will need to provide developmental opportunities, particularly on relational and interpersonal skills, to a generation that avoids face-to-face interaction and in favour of electronic communication (Barker 2012). By communicating clear performance expectations and transparent career paths, employers can help manage Millennials' expectations for themselves and their careers.

Additionally, Millennials' desire for leisure time (Twenge et al. 2010, 2012) and work/life balance (PriceWaterhouseCoopers 2011; Smith 2010) is also indicative of a generation that is less work-centric than previous generation of workers. As an example, younger workers today (i.e., Millennials and Gen Xers) are much less willing to work overtime when asked, compared to the Baby Boomers (Becton et al. 2014). This is not surprising, given many Millennials grew up witnessing their Boomer parents downsized out of a job after having spent their entire lives devoted to work, or having to live through their parents' marital breakdown (cf. Ng et al. 2010; Twenge 2006). Thus, Millennials' attitudes towards work may simply reflect their reaction

to an overinvestment in work lives by their Boomer parents. Furthermore, as Boomers age, Millennials will have the added burden of parental care, while also managing their own family life (Lyons et al. 2011). Employers must therefore look for different ways—such as promise of career mobility (in the forms of job rotation and lateral moves), flexibility in organizing their work, and financial rewards—to engage Millennials and to inspire their loyalty. These inducements also assist with the fulfilment of Millennials' preference for materialistic rewards, leisure time, and a high need for recognition.

Conclusion

Although poor labour market outcomes for young workers have been the norm across different generations, a confluence of factors have created a much more challenging labour market for the present generation of young workers, threatening the economic and psychological well-being of the Millennials. First, a highly involved style of parenting ("helicopter parents") has resulted in Millennials fostering a high sense of self-esteem and entitlement. As a result, they form high expectations of themselves and for their careers. In this regard, researchers have noted the ability–performance nexus and an impatient to succeed attitude, leading to a lack of success in the labour market. Recent economic recession has helped Millennials recalibrate their expectations with respect to their careers (Ng et al. 2010).

As a generation, Millennials also have greater access to resources, compared with past generations, resulting in the most educated generation. Many young workers will also find themselves to be overeducated relative to the work they perform. Consequently, many Millennials will experience prolonged periods of underemployment until the Baby Boomers fully exit the workforce and allow the labour market to absorb new workforce entrants. The delay in fully establishing themselves in a career may also set them back in terms of advancement and wages. As a result, it will continue to be difficult for Millennials to buy a house, start a family, and settle into adulthood (Taylor 2014).

The changing nature of work, requiring retooling and reskilling (Velazquez 2010), and the demise of long-term permanent employment will also present additional challenges to the Millennials, as they enter the labour market. In addition to the financial and economic pressures, Millennials will also have to balance raising a young family with parental care as their Boomer parents age. Given high but unfulfilled career expectations, Millennials are also stressed by work, money, and job stability. All these factors, in combination, are con-

tributing to the making of the most stressed generations in history (American Psychological Association 2012).

This unique set of factors places unprecedented strains on the millennial generation as they launch and build their careers. Employers and governments should work to address the “underemployment crisis” through interventions aimed at better matching labour market supply and demand. The long-term implications of perpetual underemployment merit further study. It would be particularly useful to examine the degree to which today’s young workers are equipped to cope with the psychological strains of this phenomenon and the factors that predict career resilience in the face of challenges and adversity. If these labour market conditions represent the “new normal,” our educational and labour policies will need to adjust to this reality and better prepare future generations of youth for the turbulent careers they will encounter.

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14

Tripartite Responses to Young Workers and Precarious Employment in the European Union

Caroline Murphy and Melanie Simms

Introduction

Youth unemployment has long been a challenge for industrialised countries and has become a policy focus since the 1980s (Bell and Blanchflower 2011). While the rate of youth unemployment in many countries eased in the early part of this century, this progress was erased by the onset of the global financial crisis in 2007 (Arpaia and Curci 2010). Young people are now twice as likely to be unemployed compared to the general population (Choudhry et al. 2012). Young workers in Asia, Africa and the USA may experience similar employment issues, but this chapter focuses on Europe because of the particularly dramatic effect of the crisis on youth unemployment. Further, the variety of contemporary political economies allows for the examination of differing institutional responses to the young worker crisis and offers important social and political insights for other regions on how to address such issues.

Youth unemployment is notoriously difficult to measure because of different requirements and expectations about the length of education (both compulsory and post-compulsory), different patterns of whether students take jobs alongside education and training (and if so, variations in patterns

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of full-time and part-time employment) and the problematic category of NEETs, that is, those Not in Employment, Education or Training who are often less visible in policy statistics. Nonetheless, it is possible to give an overview of key issues. The youth unemployment rate in Europe stood at 22.8 percent in the first quarter of 2014 (Eurostat, Table 14.1). The most useful comparator is that this is more than twice the rate for adult unemployment. Another comparator is that from 2010 to 2014, the youth employment rate in Europe fell three times as much as for adults. A further concern is the large proportion of young people in involuntary part-time or fixed-term work, which highlights the additional problem of increasing precarious work in Europe (European Commission 2014). Precarious

Table 14.1 European youth unemployment rates

Country	2014
Greece	58.8 ^a
Spain	53.9
Croatia	49.0
Portugal	35.4
Italy	42.7
Cyprus	43.2
Slovakia	32.5
Bulgaria	28.3
Ireland	25.9
Hungary	27.5 ^a
Poland	26.3
France	23.4
Sweden	23.5
Romania	23.1 ^a
Latvia	23.0 ^a
Belgium	23.9
Lithuanian	20.4
Slovenia	19.8
United Kingdom	20.3
Finaland	20.5
Czech Republic	16.4
Estonia	19.3 ^a
Luxembourg	17.2
Malta	13.7
Denmark	12.6
Iceland	10.5
Netherlands	11.3
Norway	9.5 ^a
Austria	9.5
Germany	7.8

Source: Eurostat Euro-indicators May 2014

^aDenotes 2013 data

work has been defined as ‘employment that is uncertain, unpredictable, and risky from the point of view of the worker’ (Kalleberg 2009: 2). Precarious workers face uncertainty regarding the duration of employment, may have multiple employers, an ambiguous employment relationship, experience difficulty accessing social protection and benefits associated with employment, hold low-paid positions and endure substantial obstacles to joining a trade union and bargaining collectively (ILO 2011a).

Europe has witnessed a widespread increase in precarious working arrangements (Broughton et al. 2010; Burgess et al. 2013). Although precariousness has always been a feature of some forms of employment (Vosko 2010), the increase is associated with a structural shift in employment from industrial to service sector-based jobs, advances in technology which facilitate more diverse work organisation, increased globalisation, privatisation, declining union power and the individualisation of the employment relationship. More recently, job polarisation between ‘good jobs’ and ‘bad jobs’ in many European Union (EU) labour markets has contributed to further increases in precarious employment where countries have experienced employment growth in both high- and low-skill occupations but a decline in mid-range jobs (Hurley and Fernandez-Macias 2008).

Capturing the different national and occupational debates in the area, Arnold and Bongiovi (2012) outline an array of terms by which precarious employment is referred to: precarity, informalisation, casualisation, contractualisation, flexibilisation, non-standard, irregular and contingent employment among others. We choose the term ‘precarious’ because Neilsen and Rossiter (2008) argue that it encompasses not only the condition of precarious work but also political subjection and economic exploitation. Standing (2011) identifies the *precariat* as those workers who are locked in a cycle of short-term and irregular jobs. Importantly, young workers form a disproportionate part of this group (ILO 2011b) and it is these workers who are the focus of this chapter.

The aim of the chapter is to present an overview of state, trade union and employer responses across Europe to the labour market problems faced by the young worker *precariat*. We present our analysis of secondary data (sourced from Eurofound, European Industrial Relations Observatory (EIRO), European Trade Union Confederation (ETUC) and European Commission reports) in the context of dual (segmented) labour market theory. The chapter is structured as follows: first, we categorise exactly what is meant by a ‘young worker’ in the context of current EU policy and the impact of precarious working conditions on such individuals. Here, we also provide an overview of dualism and the extent to which young workers are segmented in the labour

market. We then present an overview of state, union and employer responses to address youth unemployment and precarious work since the onset of the financial crisis. The third section of the chapter considers the influences of different responses on forms and patterns of young people's precarious work, arguing that collective actors have an often under-examined role in developing institutional responses to economic and social problems such as this. Finally, our concluding discussion offers a critical examination of the progress that has been made in this regard and the extent to which there is scope to develop a more encompassing approach to addressing the young worker crisis.

The 'Young Worker' and Impact of Unemployment and Precarious Work

Considerable debate surrounds the definition of youth in a labour context and the age categories used to define a 'young worker' vary between countries (Choudhry et al. 2012; Tyyskä 2005). Given that transition into the labour market can be delayed through the extension of education, some EU initiatives are aimed at individuals up to the age of 30 (Eurofound 2011). It is important also to consider that for those with lower socio-economic status, families often have expectations that they will take up paid employment at a young age. Despite these definitional challenges, in this chapter, we adopt the International Labour Organization (ILO) classification of age 15–24 as it is the most commonly used around the EU.

So why should young people be considered as a specific segment of the labour market? Parodi and Pastore (2012) point out an experience gap in terms of generic and job-specific work experience that makes young workers weaker in the labour market. This lack of experience can manifest itself in delayed employment and poor quality jobs which, in turn, can serve to postpone the opportunity to increase skills. This leaves young workers more likely to be subjected to flexible employment practices such as temporary contracts. As such, most member states target specific education, training and employment policies at helping young people (try to) secure effective transitions into the labour market.

At the same time, it is now widely accepted that the 'cost' of failing to make secure transitions into the labour market can be extremely problematic for individuals. Early experiences of work 'matter' as there is good evidence that they influence patterns of work and joblessness later in life (Gangle 2006). Unemployment (or partial inactivity due to precarious work) has been found to negatively impact future earnings and increase the likelihood of subsequent

spells of unemployment in a person's career, a process referred to as scarring (Bell and Blanchflower 2011). The ILO has warned of a 'scarred' generation of young workers facing a dangerous mix of high unemployment and precarious work. This is compounded by the observation that during periods of labour market contraction, it is typically young people who struggle the most to access the labour market. Verick (2009) argues that young workers are hit hardest by recession since they find it increasingly difficult to acquire a job as a new entrant in the labour market (as a consequence of hiring freezes) and to remain employed (they are more likely to be laid off than workers with seniority). Importantly, the effects of unemployment are long-lasting. In addition to economic studies (Bell and Blanchflower 2011), Clark et al. (2001) argue that past unemployment leaves a permanent scar on the human psyche that leads to lower life satisfaction. For young workers, the scarring effect of unemployment and precarious work can bring with it the absence of financial autonomy, which may constrain opportunities to live independently, start a relationship and begin a family (Carle 2003).

While there is sound evidence of the scarring effects of unemployment, comparatively less is known about the effect of low-quality or casual employment during transitions into the labour market. What is known is that someone's labour market history affects their current labour market success. Mosthaf (2014: 154) highlights that by taking up a low-paid job instead of waiting for a 'good job', individuals may shorten unemployment duration, thereby averting scarring effects associated with unemployment. On the other hand, although taking on temporary work can be viewed as a stepping stone to securing a permanent job, Booth et al. (2002) suggest that this may have a scarring effect in terms of a long-term wage penalty. A feature of this recessionary period, as compared to previous ones, is the extent to which highly qualified young workers have been affected by the economic downturn. Mosthaf (2014) found that for high-skilled workers, the penalty of entering low-wage employment is in fact stronger compared to those with lower qualifications, indicating that for at least some groups of young workers, precariousness is likely to have significant scarring effects across their labour market experiences.

Scarring has implications for the wider economy too as it contributes to poverty and wage inequality (Arulampalam 2001). In some EU member states (including Ireland, Spain, Italy, and Greece), increased emigration is another factor associated with youth unemployment or underemployment where bleak prospects lead young workers to seek opportunities abroad. Some may migrate within the EU, but not all will, thus contributing to the 'youth drain' in already ageing European economies. Policymakers have also raised

concerns about the potential impact of negative labour market experiences on young people's engagement with civil society more widely suggesting a danger that some young people may 'opt out' of participation in civic society (Simms 2014). Apparent too is that some young workers have become distrustful of the socio-economic and political systems, and expressions of this have been evident in anti-austerity protests as young people have been at the cutting edge of resisting austerity in Greece, Spain and the UK (Bradford and Cullen 2014).

Scarring is generally viewed as a long-term effect of unemployment or poor quality employment. A more short-term impact is the 'discouraged worker effect' whereby people who want a job give up the search essentially due to being discouraged by the lack of job offers. The ILO (2011b) raises a concern that the youth unemployment crisis in Europe may in fact be higher than official statistics reveal, given the 'discouraged worker effect' is more likely for the young. The ILO (2011b: 4) cites Ireland as a case where the youth unemployment rate (27.5 percent in 2010) could have been more than 19.3 percentage points higher if those who were either 'hiding out' in the education system, or waiting at home for prospects to improve, were included in the analysis. In an attempt to stem the tide of youth unemployment and thus the discouraged worker effect, European policymakers have encouraged the development of a range of active labour market policies (ALMPs) to combat the young worker crisis. The adoption of these policy interventions are discussed in the next section.

While policy decisions to improve the labour market participation rates of young people are to be lauded, it should be noted that some policies serve to heighten labour segmentation even further. A dual (or segmented) market refers to the disparities in terms of wages, career progression and job security that workers with permanent and stable job contracts (primary sector) enjoy when compared to those in precarious employment (secondary sector). Boeri (2010) argues that some European employment protection reforms aimed at increasing flexibility and reducing structural unemployment have increased dualism. We argue that young workers are most affected by these changes, increasing not only dualism in the labour market but also risk creating and exacerbating an intergenerational divide. This is particularly relevant in a context where Eyerman and Turner (1998) emphasise that as economic class has declined in significance as the primary form of social stratification, generational differences have increased as indicators of status variation. As youth unemployment and underemployment increases, European societies risk significant political conflicts around generational dimensions which states must address.

State Responses

While cyclical factors associated with depressed economies play a substantial role in the persistence of youth unemployment, the structures of labour markets are also factors. A skills mismatch in many EU labour markets has become a persistent and growing trend affecting young people, although the picture is complex. Over-education and over-skilling coexist with under-education and under-skilling in different national and sectoral contexts (ILO 2013). What is certainly clear in a range of national contexts is that young people's increased levels of educational achievement have not always been matched by labour market opportunities (Bessant and Watts 2014).

Improved integration of young people into the labour market is therefore a key policy issue of the European Employment Strategy, stressing the need to build employment pathways for young people (Choudhry et al. 2012). In general, the focus of governments across Europe prior to the financial crisis was to implement a range of measures to attempt to combat youth unemployment including enhanced ALMPs and measures to stimulate youth entrepreneurship. Since the crisis, however, many of these policies have come under scrutiny as governments attempt to reduce costs and implement austerity programmes. Many EU states have also reduced social security payments for under-25s in an effort to incentivise education and training, encourage a readiness for employment and arguably lessen the burden on welfare budgets.

European states have adopted numerous measures in an attempt to promote youth employment. Eurofound (2012) has classified responses into five broad categories: measures which intervene before risk factors occur, measures aimed to get young people back to work or training, measures which facilitate transitions to employment, measures to enhance employability and measures aimed at specific disadvantaged groups. One of the most prevalent fiscal measures adopted by several countries to reduce unemployment has been job subsidy programmes and reductions in employers' social insurance contributions. Table 14.2 provides an overview of some of these approaches from different member states.

At EU level, the Youth Guarantee is a core feature of policy in securing employment for young workers. It is a policy initiative where governments, local authorities, public employment and youth bodies commit to offering a young person a quality job, training or re-training placement within a specific period of being made unemployed or leaving formal education. Such interventions take a rights-based approach to the provision of services for young people and have been in place in Nordic states since the 1990s. As Table 14.1

Table 14.2 Typology of state measures to improve employment pathways for young people

Measure	Forms of intervention	Examples
Early intervention to ameliorate risk of unemployment	Prevention of early school leaving aimed at school and home environment	France: Priority education initiative Spain: Learning communities Italy: School work alternation scheme
Initiatives to get young people back to work or training	Reintegration of early school leavers	Hungary: Springboard, learning environments tailored to those returning to education smaller classes, job shadowing opportunities Austria: Production schools offering vocational guidance Ireland: Youthreach, curriculum for early school-leavers focusing on literacy, numeracy, health promotion and vocational subjects
Aid transition to employment	School-to-work transition	Sweden: Navigator centres
Training measures to enhance employability	Foster employability of young people	England: Connexions (now ended) Italy (2010): Higher-level apprenticeships, an opportunity to obtain a diploma or degree through training and paid employment France (2011): 600,000 additional apprenticeships in the Alternance system Austria: Supra-company apprenticeships introduced to overcome gaps between demand and supply of apprenticeships by allowing completion with numerous different employers
Measures for specific groups in disadvantage	Removal of barriers to employment Employer incentives	England: AGE programme providing grants to small and medium-sized enterprises paid in two instalments to offer high-quality training Hungary: START programme, aimed at those under 25 without a degree in casual employment. Reduces the cost of employment through a reduction of tax, making it more affordable for employers to hire among this group

Source: Based on data from the Eurofound (2012) report Effectiveness of policy measures to increase the employment participation of young people

illustrates, the majority of Nordic countries have far lower youth unemployment rates than the EU average and the tripartite cooperation required to coordinate the Youth Guarantee is argued to be an important part of the reason why. The Youth Guarantee essentially puts the onus on the state to secure

employment or training for young people in a bid to prevent them falling into long-term unemployment. As part of the European Commission's Call to Action on Youth Unemployment 2013, all countries with a youth unemployment rate of over 25 percent (see Table 14.1) were required to submit a Youth Guarantee implementation plan by December 2013 with remaining states required to complete a plan in 2014.

While the Youth Guarantee and initiatives outlined in Table 14.2 are intended to address barriers to employment, these measures are not specifically designed to tackle the growing problem of precarious employment. Casual employment in Europe has risen dramatically and now 42 percent of young workers are on temporary contracts, compared with just 13 percent among adult workers (ILO 2012). We argue that focusing only on the numbers of jobs available to young workers in the labour market is not sufficient to tackle issues of precarious work. Rather, attention must also be paid to job quality even during periods of crisis and recovery, otherwise state policy risks exacerbating already evident developments that have brought new forms of precariousness to the labour market.

This tension can be seen in debates about 'employability', which is a key focus of many government employment and training policies. We argue that the problem with ideas about 'employability' is that they focus attention on the skills and actions of young people themselves rather than looking at structural changes in labour markets. Moore (2010) argues that closer attention must be paid to the extent to which *opportunities* exist for young people to move into good quality employment and the role of the state.

The high level of both unemployment and underemployment calls into question the appropriateness of the flexicurity model encouraged across Europe right up until the financial crisis in 2007. To implement flexicurity policies, member states were advised to increase labour market flexibility while simultaneously improving workers' ability to make labour market transitions through ALMPs and measures that increase workers' employability (Heyes 2013). However, the extent to which flexicurity is compatible with robust employment protection legislation and measures that promote job security is debatable (*ibid.*) The onset of the financial crisis led employers in many member states to shed jobs (in many cases, quite easily due to low levels of employment protection as a whole or for precarious workers). Generous social welfare benefits were touted as a cornerstone of flexicurity models but in this case, young workers are again hit hardest where governments have made cuts to social welfare entitlements with tougher cuts applied to the under 25s. The Irish case is notable but not especially unusual where new claimants receive only around half of previous social security payments.

In summary, then, it is clear that the financial crisis and increased indebtedness of member states have created particular challenges for young workers. Prior to the financial crisis, changes in labour markets meant that young people were already struggling to make transitions into secure employment and more often found themselves in precarious work. Since the crisis, this trend has intensified and both unemployment and precarious work have increased for this group. Previous policies at both European level and within many member states emphasised the importance of ALMPs and relatively generous benefits to protect insecure workers if they were made redundant. However, austerity measures resulting from the financial crisis have brought these policies under considerable scrutiny and many states have had to make considerable cuts.

Young people are one group that have borne the brunt of these changes. They often lack sufficient payments and/or the necessary contractual status to claim social security. Employers complain about a lack of appropriate skills, while states fail to implement appropriate curricula and vocational education and training (VET). Rhetorics of ‘employability’ place the emphasis on young people analysing future labour market demands in sophisticated detail and then investing time—and often money—in securing appropriate training and labour market experience. Initiatives to ameliorate youth unemployment typically focus on the quantity rather than the quality of jobs available. Overall, the picture is bleak. What then are unions doing to address these issues?

Union Responses

In the last section, we noted how states have generally intervened less to tackle precarious employment (what is called in some literature ‘job quality’) than unemployment. In part, this is because the power of global capital has exceeded the ability of state and labour movements to regulate it, exacerbating inequality and precarious work (Arnold and Bongiovi 2012: 290). It also reflects the fact that the experience of economic insecurity and inequality are highly related, but a far weaker relationship exists between economic security and overall economic growth (ILO 2005). This raises questions about whether state and institutional bodies are truly concerned with tackling precarity since gross domestic product growth is a core indicator of national economic welfare and precarious working arrangements can be effective at disguising or misrepresenting higher levels of unemployment. For these reasons, the role of the labour movement is important to examine how unions respond to the growth of youth unemployment and precarious work because they could be

critical in influencing the response to precarious employment at all levels of the economy.

Unions are potentially very significant in protecting young workers (Bailey et al. 2010) and the union movement itself has much to gain by championing the cause of precarious young workers because, as Visser (2002: 416) demonstrates, ‘people join the union within the first few years following their entry into the labour market, or they do not’. Budd (2009) picks up this analysis and suggests that unions have a finite window of opportunity during which to recruit the young worker. Advocating for improvements for young people facing problems making transitions into secure work could therefore be an important strategy for unions to regain membership influence while also promoting the interests of workers at the lower end of the labour market.

Despite these potential opportunities, the young worker crisis also presents challenges for unions. Increases in precarious work and complex entry routes into the labour market make unionising young workers more difficult as the ‘first job’ becomes more elusive. Cregan and Johnston (1990) highlight that workers who are less committed to their present employment are also less likely to commit to union membership. As a result, commentators on precarious work argue that unions may struggle to recruit workers who see little long-term future in their current job. Equally, unions face structural challenges in that many young people work in sectors where unions have struggled to establish a powerful presence. Unions that can appeal to young workers as champions of social justice and intergenerational solidarity in the labour market have much to gain. Supporting young people once they have a job and engaging this new generation of workers is critical for unions who want to increase density. If unions largely fail to do all this, it will eventually impede their generational renewal, worsen their already skewed representation of the workforce and reinforce the nearly universal de-unionisation trend in advanced capitalist societies (Bailey et al. 2010).

Through a range of mechanisms, unions can focus attention on to the interests of young workers. Drawing on Heery and Abbott (2000) but focusing specifically on young workers, Simms (2014) proposes a typology of union responses to the representation of young workers (see Table 14.3). Particular challenges exist when it comes to representing young workers because the ‘identities’ of individual unions influence the extent to which they prioritise the representation of either their (young) *members* or of (young people in) the *general workforce* (Hyman 2001). Hyman contends that, in general, it is more common for unions to seek to prioritise their current members’ interests. We argue that this can come at a cost of representing the needs of potential members, including young workers.

Table 14.3 Typology of union representation of young worker interests

	Representation	Mobilisation	Marginalisation
Representation of young members' interests	Bargaining and organising—company Bargaining and organising—sectoral/national	Strikes, demonstrations, flashmobs etc.	Marginalisation of youth interests within the union
Representation of young members and young people more widely	Bipartite/tripartite discussions about e.g. regulating apprenticeships etc. Expansionist organising activity	Demonstrations	Marginalisation of youth interests in society

Source: Simms (2014) adapted from Heery and Abbott (2000)

Unions therefore have choices about whether, and if so how, to engage young workers. They may be fundamentally opposed to separating and dividing workers and seek to represent the interests of all workers, including young people. Alternatively, they may seek to prioritise the interests of members as many unions have done when faced with austerity measures targeting public sector pay and pensions. Confronted with this dilemma, many unions around the EU have agreed to contractual changes that leave young workers with more disadvantageous terms and conditions than their older counterparts. In other national contexts, unions' marginalisation of young workers has not been deliberate but occurred due to the inability to organise workers who sign civil contracts outside the remit of labour code regulations (Simms 2014). Unions will undoubtedly grapple to balance member interests with policies to aid young workers more generally while austerity continues.

On the other hand, when unions choose to represent young workers, there are examples of innovation in promoting their interests within union representation structures. One widely discussed initiative saw French unions sign agreements with large employers (Bayard, PSA Peugeot Citroen) to prioritise the recruitment of young workers in a deliberate effort to address youth unemployment (Simms 2014). Unions too have been active in lobbying governments to invest in ALMPs such as tax reliefs, training and apprenticeship placements to create opportunities for younger workers.

Our focus is not only on what unions do to organise and represent (or not) young workers, but also on what they do to seek to tackle the proliferation of precarious work. Unions may have a pragmatic incentive to prioritise addressing precarious work since such practices have the potential to undermine the terms and conditions of their core membership. Also drawing on Heery and Abbot's (2000) typology of union responses to insecure workers,

Table 14.4 Typology of union responses to precarious work

Response	Strategy
Inclusion	Integrate precarious employees into their constituency without making specific differences between precarious and regular workers
Exclusion	Serve as interest representation organisations for regular employees only and exclude precarious workers from their constituency
Separation	Separate precarious workers from their constituency, creating a group requiring special attention
Reduction	Unions strive to influence changes in employment conditions to make precarious work more comparable to employment conditions of regular employees, e.g. through legal regulation
Elimination	Treatment of precarious employees may encompass inclusion or separation as temporary strategies on the way towards an elimination of precarious employment

Source: Kahancová and Martíšková (2011) adapted from Heery and Abbott (2000)

Kahancová and Martíšková (2011) outline unions' strategies regarding precarious work including strategies to *eliminate* precarious work from the economy or a specific sector altogether or to *exclude* precarious workers and separate them from the interests of regularly employed workers, viewing them as a threat to undermine conditions of employment. The high levels of young people in precarious employment in Europe mean that union strategies to either improve job quality or to resist efforts to increase precariousness have an inevitably important impact on young workers (Table 14.4).

Examples of how unions in some countries have been able to protect (young) workers from structured efforts to reduce job quality can be seen in both Hungary and Slovenia, where unions have successfully mobilised against proposed changes to employment legislation that would create 'mini jobs' with fewer legal protections than established jobs (Simms 2014). Italy has been a particularly interesting case as precarious work for young people has been a dominant feature of the labour market for some time and has been exacerbated by the crisis. This has seen the development of new forms of representation for young and precarious workers both within and outside the trade union movement. These new representation bodies have directly challenged the more conventional bargaining approaches of unions. Choi and Mattoni (2010) highlight that traditional unions often have a fairly predetermined, corporatist set of collective actions, whereas new social movements representing precarious workers (often self-organised) tend to carry out more radical, disruptive strategies or grassroots mobilisations within and outside the workplace. Some of these movements have been incorporated into existing union structures, while others remain outside the conventional labour movement.

Unions, then, have a particular interest in organising and representing young workers and this agenda intersects in important ways with challenges in organising and representing precarious workers. Unions have choices about how they develop policies in this area and it is clear that there have been important efforts to expand representation to these groups. However, despite widespread evidence of efforts to engage these workers, many unions are still slow and bureaucratic, protecting the interests of existing members above younger (potential) members. In some cases, this has prompted mobilisations beyond the structures of unions that have sometimes then been assimilated into unions. Overall, though, the picture is one of unions struggling to recruit young and precarious workers because representation structures in sectors where young people work are often not strong. Around the EU, sectors such as hotels, catering and hospitality are dominated by small workplaces, insecure work and low levels of union representation. Despite some important initiatives, unions across the EU struggle to influence job quality in these sectors, often reinforcing ideas that unions are ineffective and irrelevant to young workers.

So the influence of unions in improving the situation for young, precarious workers is, at best, highly variable. No member states stand out as having 'solved' the problem of recruitment, although in countries where unions have the institutional right to a voice in bipartite (unions and employers) and tripartite (unions, employers and the state) bargaining forums, they at least have a say in agreed mechanisms to regulate some aspects of young people's transitions into the labour market, especially around apprenticeships. To a large extent, all unions can ever do is respond to the challenges they are presented with, so our attention now turns to employers and what they can do.

Employer Responses

Notwithstanding state and union efforts to alleviate the youth unemployment crisis, ultimately the decision to hire (young) workers rests with employers. Equally, the preponderance of young people in precarious employment is, in part, due to cyclical and structural aspects of the labour markets, but also employer behaviour. Further, long periods of joblessness (or underemployment) may signal to an employer a lack of potential or motivation on the part of an applicant, thus creating a vicious cycle of unemployment for young workers (Spence 1974). For all of these reasons, employers therefore are fundamental in providing opportunities to enter the labour market (Cominetti et al. 2013), but their role is under-researched and under-theorised (Keep 2012).

A recent report (2012) by the UK-based Chartered Institute for Personnel and Development (CIPD) acknowledges that employers can hold unconscious bias against young people. Employers tend to question the extent to which young workers are prepared for working life, whether they possess the basic skills required and question their attitudes towards work (Hasluck 2012). They go on to argue that the 'business case' for employing young workers needs to include a focus on improved workforce planning, bringing a unique skill mix, greater workforce diversity and ultimately cost-effectiveness for employers. Nonetheless, barriers persist. Cominetti et al. (2013) highlight that even where employment opportunities exist, recruitment processes that rely on informal networks risk unfairly disadvantaging young workers who may not have equal access to those networks. Similarly, the CIPD (2012) argue that competency-based interviewing disproportionately disadvantages young candidates who have less experience on which to draw.

Employers clearly 'matter' in the transitions young people make into the labour market, and we can therefore identify a range of employer initiatives that are aimed to help young people. Table 14.5 shows the main activities. Some are incentivised by states and, less commonly, unions. Others can come from employers acting unilaterally, often because it is seen as important to be acting in this area.

Work experience, apprenticeships and trainee programmes provide a realistic means for employers to alleviate the youth employment crisis as they benefit younger workers by helping to overcome the lack of experience that is often

Table 14.5 Employer-focused initiatives to help young workers

Form	Description
Work experience	Short- or medium-term job placements (usually unpaid) targeted at young workers often in conjunction with VET. Without incentives, some employers may choose to participate for reasons around ideas of corporate social responsibility
Internships	Medium-term job placement (unpaid or participant stipend) aimed at building job-specific skills
Formal apprenticeships	Mix of on-the-job training and classroom-based learning
Wage subsidy and/or tax exemptions	State-led schemes whereby employers receive a temporary subsidy for hiring a young person who has been unemployed
Prioritising recruitment of young workers	Either voluntary HR policy or collective agreements entered into with unions to prioritise the recruitment of young workers
Temporary/precarious recruitment	Recruiting young workers on flexible employment terms e.g. temporary contracts

a quagmire for younger workers (Cominetti et al. 2013). Apprenticeships are defined by the European Commission as programmes 'that formally combine and alternate company based training (periods of practical work experience at a workplace) with school-based education (periods of theoretical/practical education followed in a school or training centre), and whose successful completion leads to nationally recognised certification degrees'. While such programmes are undoubtedly extremely helpful to young people and are often highly sought after and oversubscribed (Cominetti et al. 2013), evidence from around the EU indicates that these programmes are often seen as a panacea by governments and social partners (Eurofound 2011) with relatively little attention paid to the quality of work, training and opportunities on completion. Despite these weaknesses, polices throughout Europe are heavily focused on engaging with employers and incentivising the creation of apprenticeship programmes as there is strong evidence that these schemes can result in positive outcomes for many, although not all, participants.

The German dual educational model is often held up to be the benchmark for apprenticeship systems. It blends classroom education with on-the-job training through apprenticeships, equipping young people not bound for university with practical labour market skills. Unions are also central to negotiating numbers and quality of apprenticeships offered. As discussed in the following section, this kind of joint and collective regulation of labour market transitions appears to be significantly more effective at regulating work opportunities available to young people. However, even in collectively regulated systems such as Sweden, employers' associations express frustration with the perceived lack of work-related skills of young people and have argued for greater flexibility in the system.

Large employers across Europe have historically proved willing to engage with apprenticeship initiatives as they can usually have planning horizons that allow them to fulfil an apprenticeship obligation. A missed opportunity for some time has been the untapped capacity of small and medium employers who have been more hesitant in committing to long-term apprenticeships opting instead for short-term contracts. As some of the initiatives in Table 14.2 illustrate, changes are occurring in this area with options available to employers to provide only partial work experience to an apprentice as part of a wider programme of training. Further evidence of innovation is that apprenticeship and training programmes are now featuring among employers in industries where such opportunities would not historically have existed. In Scotland, for example, Creative Scotland targeted 20–30 year olds who experience barriers to developing a career in the arts by offering support to organisations of up to £10,000 for a full-time, year-long traineeship. Organisations

taking part offered a contract of employment and contributed to all other costs towards the salary and development of the trainee. This illustrates that there is some innovation in sectors that have often struggled to provide secure labour market transitions for young people.

Comparative research (Eurofound 2011) has shown that a consistent aspect of employers' debates with regard to youth employment is the perception of a mismatch between the knowledge acquired through formal education and the skills required by the labour market (Choudhry et al. 2012). One way that employers can ensure that the skills developed through training match industry requirements is through sector-specific training levies where employers contribute to a fund that pays for training. Employers can then apply to the schemes for training grants, thus providing a stimulus for training. These schemes are widespread in countries and sectors that have more coordinated mechanisms for regulating labour market entry. However, the international Bureau for Employers' Activities (2011) has highlighted that such schemes often fail to increase training with companies citing bureaucratic procedures as reasons for not becoming involved which, coupled with the levies, can increase the cost of some apprenticeships. Nonetheless, these schemes can be useful in spreading the cost and the risk of training in sectors where there are specific skills shortages and/or sectors dominated by small employers.

As highlighted previously, one mechanism often adopted by governments to promote youth employment is the use of ALMPs such as tax incentives and job subsidies for employers hiring workers in a particular age group or who have been long-term unemployed. These were a common but not universal response of states to the financial crisis. One example is the Irish JobsPlus wage subsidy scheme, through which regular cash payments are made to employers to offset wage costs where they employ someone who has been registered as unemployed for more than 12 months. For the most part, employers have responded positively to such initiatives. However, arguments against these schemes highlight that the state is effectively paying a 'deadweight cost' for a post that may have been created without the incentive. In addition, critics have stressed that wage subsidies can create displacement effects as firms benefiting from the subsidies attain a competitive advantage.

One issue to receive considerable attention since the financial crisis has been the growth of short-term internships as a central part of young people's transitions into the labour market. Internships, both paid and unpaid, have existed for a long time but there is growing concern around the EU that their use has become more common. There is a view that internships may be replacing quality employment for young people and creating

further hurdles to entering the labour market, especially where they are unpaid or paid at only a very low rate (Youth Forum 2011). A further argument is that a ‘substitution effect’ occurs where subsidised workers replace non-subsidised ones who may have been employed on a temporary basis, ultimately serving to shift unemployment rather than alleviate it. Despite these criticisms, few would argue that gaining work experience is not an important part of making secure labour market transitions. Thus, attention of many campaign groups and unions has been on seeking to regulate the quality of work experience and internship schemes rather than to abolish them all together.

Beyond access to jobs, employers play a key role in delivering high-quality employment for young workers. Employers have been accused of pushing the element of risk in the employment relationship on to employees through the proliferation of precarious working arrangement and temporary contracts (see Table 14.5). Scarpetta et al. (2010) note that for many young workers, temporary contracts can be a stepping stone to a permanent contract; however, in today’s economy, precariousness extends far longer than the early career, meaning that they can become a persistent feature of employment (Tattara and Valentini 2012). Labour market analysis shows that increasing numbers of young workers become trapped in these types of contract (ETUI 2012) and the president of the European Youth forum (April 2014) has been critical of the regulation of employers around youth employment initiatives stating that the '*any job is a good job*' mantra underlying many policies is unsatisfactory and increases precarity.

It is evident that the policies and behaviours of employers are central to understanding how and why employment opportunities for young people have become more precarious and it is essential to re-emphasise that this is a structural as well as a cyclical problem. The financial crisis has exacerbated trends that were evident since at least the start of the 2000s. This suggests that changes to the wider economic, social and political contexts (what we might as shorthand call the ‘financialisation’ of capitalism) have meant that young people’s transitions into the labour market have become longer, more complex and less secure. This is particularly problematic because an upturn in the economic context is only likely to relieve the most extreme pressures on young people rather than to shift the picture entirely. Nonetheless, it is clear when we look around the EU that some mechanisms for regulating these transitions have been more effective than others in reducing the worst effects on young people. The final section of this chapter therefore presents a brief evaluation of different approaches to regulating youth employment transitions in different contexts.

Evaluating Outcomes of Youth Employment Policies

A central difference between national contexts around the EU is between countries that have more coordinated and regulated mechanisms for facilitating young people's transitions into the labour market, as compared to those that have greater emphasis on market regulation. Broadly speaking, countries such as Germany, Netherlands, Sweden and Denmark have more coordinated structures, whereas the UK and many new member states place greater emphasis on the market. Coordinated structures rely on negotiation between employers and unions, sometimes involving the state, especially where state funding is central, for example, to delivery of training or where there is a particular crisis in a strategically important sector. To be clear, the differentiation here is one of emphasis rather than absolutes. Countries relying on market mechanisms do still have systems to support (young) people who have been unemployed for a long time, and sometimes even experiment with initiatives such as job subsidies. The point here is that even where these schemes exist, they are rarely negotiated with the social partners.

So how do these different approaches affect young peoples' transitions into the labour market when we consider the numbers of jobs available? The first point to note is that Germany cannot and should not be simplistically held up as a 'jobs miracle', as it often is in wider public debate. The German economic model has undoubtedly proved extremely resilient to the effects of the financial crisis in 2008, and this has been helped by a strong export focus, robust home demand, and considerable weight in negotiations about the survival of the Eurozone—and the labour market is also an important part of the story. Two factors are especially important in explaining the low levels of youth unemployment: a small youth cohort and labour market deregulation. Germany was lucky in the fact that it had a very small youth cohort for the five years immediately after the great financial crisis. At the same time, labour market reforms designed before the crisis started to have their full impact. These have allowed for considerably greater flexibility in hours, pay and job quality which have, in turn, ensured that job creation has continued, albeit with concerns that these 'mini-jobs' risk undermining job quality in more traditional occupations. When we add to this the fact that traditional occupations do have well-established routes through training and apprenticeships, the picture for young people in general is very healthy.

By contrast, the UK—as an example of a market oriented policy context—has seen very different dynamics. Job retention for those already in the

labour market has been remarkably high and much less of a problem than was anticipated at the start of the crisis. However, labour market entry during this period has proved extremely problematic and young people have borne the brunt as they are the single largest group entering the labour market. There has been little coordinated effort to offer alternatives to labour market entry, such as extended participation in education. As a result, unemployment has risen dramatically among this group and may well remain high due to scarring effects and the risk that employers may hire the next cohort of young people leaving education rather than those currently unemployed.

This brief comparison of two very different approaches to the challenge of youth employment highlights that any policy response is, inevitably, shaped by the labour market and political context in which it is formed. It also shows that some factors—such as the numbers of young people in any one age cohort—are beyond the control of policymakers and social partners. Nonetheless, there are consistently more positive outcomes for the numbers and quality of jobs available and the systematic regulation of transitions into those jobs in countries that have bipartite and tripartite regulation mechanisms.

And what about the quality of jobs available to young people? Discussions about internships, traineeships and apprenticeships focus our attention on what happens when young people come to the end of these experiences. This is an issue that has generally received little attention from employers and from governments. Even in Germany, unions consistently raise concerns about what happens to apprentices once they have completed their training. In many countries, some employers are widely known to offer permanent employment only to a small proportion of successful trainees, indicating that these schemes cannot be taken as a simple proxy measure for a secure transition into the labour market. Concern has also been raised as to the overall quality of training opportunities. Problems include relatively high dropout rates, short-term training placements and the quality of the training provided. In the UK, these concerns have been addressed by giving the education inspection service, Ofsted, oversight of the quality of training provision and they have been extremely critical of some apprenticeships (Ofsted 2013). Overall, the market approach to regulating labour market transitions has pushed towards ‘employer ownership of skills’ which emphasises employers taking the lead on developing whatever skills and training provision they want. This must surely raise potential concerns about the consistency and quality of training opportunities.

Overall, then, the specificities of each national context mean that it is impossible to make any generalisable evaluations about policies that ‘work’ and those that do not. What we can say is that labour markets that are more

closely coordinated and which have mechanisms for negotiation between social partners—and the state where relevant—seem to create more and better opportunities for young people in times of economic crisis. It is also our contention that these structures provide greater protection for young people against the wider effects of financialised capitalism because those institutions act to mitigate both the ‘shocks’ of crisis *and* to mediate the on-going difference of interests between labour and capital.

Conclusion

In this chapter, we have examined the responses of governments, unions and employers to the crisis of unemployment and precarious work facing the millennial generation. The literature outlines the efforts made across the EU to increase education and labour market skills for young workers. It is worth noting that many of these measures are targeted at low-skill groups or those who lack significant work experience and are identified as the most vulnerable. Equally, our focus here has been on the standard ILO definition of ‘young workers’, that is, those aged 15–24. It is notable there has been little emphasis on skills development or retraining for the cohort of young workers between the ages of 25 and 30 particularly those who already hold work experience but due to structural changes are also left with relatively few labour market options. There is a need to provide support for young job seekers who wish to shift their career orientations and adapt their skills towards sectors in demand in order to address existing job vacancies. Young people with pre-existing third-level education also need to be catered for where for structural reasons quality employment opportunities may be lacking and the costs of re-training after gaining a university degree (or equivalent) are high.

In this chapter, we have discussed how fiscal policy to stimulate hiring activity through job subsidies has been criticised in some countries as potentially displacing real employment opportunities. We have also drawn attention to how unions have sometimes exacerbated the problem of precarious work for young people by prioritising the protection of their existing members. We therefore argue that a long-term solution to the problems that young workers face requires a coordinated effort between state, unions and employers because there is growing debate on the extent to which state policies to increase retirement age, protectionist approaches by unions and employer preferences for experienced workers are creating intergenerational conflict in the labour market. Furthermore, it must be acknowledged that reductions in youth unemployment can be more of a political victory than a long-term achievement if

the result is detrimental to overall employment quality for young workers and thus increasing dualism in the labour market. It has already been highlighted in this chapter that temporary jobs have a scarring effect on future earnings relative to permanent secure employment; indeed, comparative research across EU member states on the wage gap for young workers who entered the labour market in the past decade would add to a greater understanding of the impact of national strategies. Additionally, research assessing the success or otherwise of trade unions to recruit and crucially retain the membership of young workers is desirable. Unions must continue to represent a significant proportion of the labour force for the tripartite model to continue, and the membership of young workers is crucial in this regard.

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15

Young Workers in Europe: Perceptions and Discourses on the Labour Market

Luis Enrique Alonso and Carlos J. Fernández Rodríguez

Introduction¹

The situation of young people in Europe and their inclusion in the labour market have become key issues on the European employment agenda. The phenomenon of youth unemployment, vulnerability and precariousness have gained the attention of institutions, politicians and the public opinion since at least the mid-1970s, as young workers became one of the most vulnerable social groups in a context of rising unemployment (despite periods of economic boom). Globalization, information and communications technology (ICT) and the financialisation of the economy have readjusted the world economy, and these factors have influenced substantially the organization of labour, leading to processes of destandardization and rising dualization in the labour markets (Koch and Fritz 2013). Youth is perceived as a fragile subject in the labour market as the numbers of unemployed in the lower age cohorts have been rising significantly through the last decades disregarding gender or level of education. In the European case, the figures show that unemployment among young people has been quite high during the last decade (Fig. 15.1).

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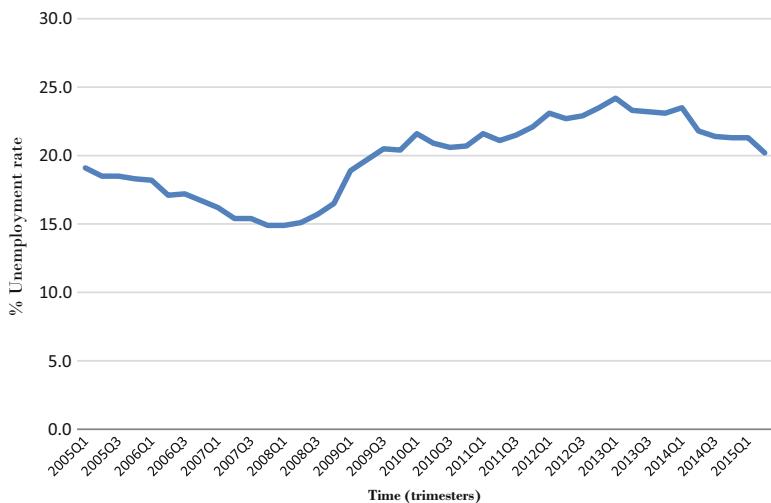


Fig. 15.1 Trend of unemployment rate among <25-year-olds (%) in the EU-28, 2005–2015 (Source: Eurostat 2015)

With the onset of the global financial crisis, the situation of this collective has become critical and the risks associated with exclusion and vulnerability have increased enormously, particularly in the Southern European countries. The rise of interest in the precariat—as Standing (2011) defines a wide number of groups, among them young people, stuck in a cycle of short-term and irregular jobs—proves that research on young workers is key to understanding the challenges of the workforce in the near future, in a context of growing inequalities (Piketty 2014).

Youth is a very difficult concept to define (Bourdieu 1993); institutions and governments use different definitions and therefore establish different boundaries. However, as a differentiated social group, it seemed to emerge (in social sciences) due to the engagement of the “sixties generation” with new forms of politics and culture. Before the post-war period, the conditions of life for most of the European individuals akin to “young” were harsher, being pushed to join the labour market (or war) as soon as they left infancy as well as forming families in their late teens in many cases (especially women). However, redistribution policies following the collapse of the totalitarianisms helped to forge a new generation with massive access to higher education and better standards of living, including the possibility of consumption (Alonso 2006). Being a young person became a master symbol in the emerging hedonist culture linked to social transformations (counterculture, sexual liberation) (Roszak 1995).²

² As Bourdieu (1993) argues, youth and age are not self-evident data, but are socially constructed. Certainly, the age cohort associated with youth has been evolving. While in the 1960s, we could speak of people in the early 20s, nowadays the age groups related to youth are certainly broader.

Curiously, nearly a decade later, and while still embedded in a new culture where being young was symbolically very attractive—particularly in the realm of consumption—the collective of young people started to appear stigmatized in the labour market, facing a rising unemployment rate (Freeman and Wise 1982). European governments pushed different deregulation policies designed to improve flexibility in the European labour markets and fix that problem of youth unemployment (Boyer 1987; Jessop 1995; Kumar 1995; Alonso and Martínez Lucio 2006; Koch 2006). Labour market reforms such as the Law 30/1984 in Spain institutionalized the fixed-term contracts in order to help young people find employment (Sola, Alonso, Fernández Rodríguez and Ibáñez Rojo 2013). However, these have involved dramatic social costs in some countries in the long run (e.g. Spain, Greece, Portugal, Italy, even France). While designed to minimize the impact of the drastic measures associated with economic reforms (mostly massive unemployment), non-standard employment policies helped to produce a fragmentation of labour situations in which the weaker groups of the working population ended up being exposed to instability, low salaries and generally low-quality employment (Bauman 1998; Kalleberg 2009). The main outcome has been, unfortunately, the generalization of precarious labour conditions for young people in some European countries (Supiot 2003; Castel 2006; Blossfeld et al. 2008), and in specific cases, even the degradation of their social profile and image, linked to the stereotypes of lower-class “chavs” (Jones 2012).

Therefore, the situation of young workers is generally difficult and represents a challenge for European legislators and policymakers, precisely because as a group, they are difficult to represent. As mentioned before, is a young worker a worker under 25 or a worker under 35? The longer life expectancy and the cultural changes regarding family, leisure or lifestyle makes it difficult to draw a line. Moreover, in some countries, actions like leaving home might be extremely different for young people, as a comparison between Nordic and Mediterranean countries would manifest. What role does economic independence play? And education and experience? In this chapter, our aim is to provide an overview on the situation of young workers in Europe, taking into account these conceptual limits. And while there has been an extensive body of work focusing on the rise of non-standard employment and the increasing vulnerability of young workers in Europe, there is little research on how this situation shapes their attitudes and perceptions of the labour market and their possible life trajectories (there are indeed a few exceptions, see e.g. Escott 2012).³ Our contribution will be focused on

³ Interestingly enough, there is more research on this topic in other latitudes, such as Australia (see e.g. McDonald et al. 2012).

unwrapping those attitudes and perceptions and is divided into three sections. Firstly, we will provide some data on youth unemployment in Europe and other relevant statistics that help us to understand better the challenges young people have faced in the labour market throughout the years. The second section will focus on the issue of their discourses using as an example one specific study on Spanish young workers. This text will end with a brief conclusion.

European Young Workers: An Outlook

Worker vulnerability is associated with the rise of non-standard employment: uncertainty and insecurity over income, employment conditions and employment continuity (Burgess et al. 2013). As scholarly research has proved (see e.g. Jessop 1995; Kumar 1995; Alonso and Martínez Lucio 2006), the growth of non-standard employment has become a key issue in Western societies since the late 1970s, usually linked to the transition towards a post-industrial economy. The rising figures of unemployment after the oil crisis, particularly among younger workers, brought important concerns about the sustainability of the Fordist institutions and the foundations of Keynesian economics. Both had dominated the Western bloc since the end of World War II but they did not seem to offer a solution. Therefore, the 1970s witnessed a new approach to labour market problems, increasingly influenced by neo-liberal theories. Most of the Western countries undertook important reforms in their labour markets focusing on the creation and development of new forms of employment that would help not only to fight against the persistent problem of unemployment but also to improve flexibility in human resource management as well. These new policies were developed through strategies such as flexicurity (Serrano Pascual and Magnusson 2007; Keune and Serrano Pascual 2014). This led to a more fragmented landscape in terms of labour arrangements, with a new widespread portfolio of contracts, conditions and arrangements that dissolved the standard norm of employment that had been a landmark of the Fordist socio-economic system (Alonso and Martínez Lucio 2006).

Thus, young people suffered not only higher unemployment but also were subjected to these new forms of non-standard employment, becoming since the 1980s one of the most vulnerable groups in the labour market, particularly in Southern Europe. Statistics show that European young workers suffer a much higher unemployment rate than their older countrymen. In

Table 15.1,⁴ we can see that in most of European countries, young workers suffer more than twice the level of unemployment, no matter the economic cycle⁵:

Table 15.1 Unemployment rate by age group (%)

Country/area	Under 25 years		25–74 years	
	2005	2013	2005	2013
EU (28 countries)	18.9	23.6	7.7	9.5
Euro area (18 countries)	18.2	24.1	7.9	10.7
Belgium	21.5	23.7	7.1	7.1
Bulgaria	21	28.4	9	11.8
Czech Republic	19.3	18.9	6.8	6.1
Denmark	8.6	13	4.2	5.9
Germany	15.4	7.8	10.6	4.9
Estonia	15.1	18.7	7.2	7.6
Ireland	8.6	26.8	3.5	11.6
Greece	25.8	58.3	8.4	25.4
Spain	19.6	55.5	7.7	23.8
France	21	24.8	7.5	8.7
Croatia	31.9	50	10.5	14.4
Italy	24	40	6.2	10.3
Cyprus	13.9	38.9	4.3	13.6
Latvia	15.1	23.2	9.3	10.7
Lithuania	15.8	21.9	7.7	10.9
Luxembourg	14.6	16.8	3.8	5.1
Hungary	19.4	27.2	6.1	8.9
Malta	16.1	13	4.7	5.2
Netherlands	9.4	11	4.5	5.9
Austria	10.3	9.2	4.3	4.3
Poland	36.9	27.3	15.2	8.8
Portugal	20.7	38.1	7.3	14.7
Romania	19.1	23.7	5.6	5.7
Slovenia	15.9	21.6	5.4	9.2
Slovakia	30.4	33.7	14.4	12.5
Finland	20.1	19.9	6.8	6.5
Sweden	22.6	23.6	5.7	5.7
UK	12.8	20.7	3.3	5.4
Iceland	7.2	10.7	1.6	4.3
Norway	11.4	9.1	3.4	2.6
USA	11.3	15.5	7.5	7.5
Japan	8.7	6.8	4	6.1

Source: Eurostat (2015)

⁴It is relevant to pinpoint that the term “young” used in this section refers to people under 25. It is the only option if comparisons are to be established using Eurostat statistics. We are aware that this group division does not reflect neither increased period in education and internships linked to higher education nor people who have retired.

⁵We compare here the most recent data available at Eurostat (2013, with some countries experiencing a strong crisis) with data from 2005, when many European countries were enjoying an economic boom.

Differences are quite strong all over Europe in terms of unemployment rates. However, some countries with quite high unemployment have featured extremely high rates, framing youth unemployment as one of the main problems of these societies. It does not seem to help that the level of education has substantially grown, neither have any technological or labour market reforms had any effect. The deep economic crisis these countries are currently suffering has deepened this almost structural situation. Spain and Greece have nowadays rates over 50 per cent, deepening the social exclusion of the younger generations and forcing them to migrate to stronger economies (O'Reilly et al. 2015). When all under 30-year-olds are considered, the data on unemployment is the following (Table 15.2):

Table 15.2 Youth unemployment rate (15–29 years)

Country/area	2005	2013
European Union (28 countries)	14.6	18.2
Euro area (18 countries)	14.1	19.3
Belgium	14.1	15.1
Bulgaria	:	21.7
Czech Republic	12.8	12.5
Denmark	7.0	11.2
Germany	13.2	7.0
Estonia	11.2	13.5
Ireland	6.6	21.3
Greece	19.8	48.6
Spain	14.8	41.4
France	14.9	17.7
Croatia	:	33.5
Italy	17.9	29.7
Cyprus	10.4	29.8
Latvia	11.8	16.5
Lithuania	10.1	17.2
Luxembourg	8.0	10.4
Hungary	12.2	18.0
Malta	11.5	9.1
Netherlands	6.0	8.8
Austria	7.3	7.2
Poland	27.8	18.9
Portugal	13.2	28.5
Romania	13.7	15.9
Slovenia	12.2	18.3
Slovakia	22.6	24.4
Finland	14.4	14.9
Sweden	16.0	15.8
UK	9.5	14.9
Iceland	5.6	9.4
Norway	8.5	6.8
Switzerland	5.3	6.0

Source: Eurostat (2015)

With the onset of the financial crisis, unemployment has reached maximum heights in some countries, particularly those subjected to austerity programmes. In Spain and Greece, the unemployment rate for under 30-year-olds is over 40 per cent. The number of young people enjoying temporary employment and fixed-term contracts has not changed substantially. However, in Southern European and Eastern European countries, fixed-term contracts seem to be more common (Table 15.3).

A form of non-standard employment that is also increasing is part-time employment. Interestingly, this non-standard form of employment has been traditionally more common in Northern Europe but not so much in Southern

Table 15.3 Young temporary employees as a percentage of the total number of employees (15–29 years)

Country/area	2005	2013
European Union (28 countries)	29.6	31.5
Euro area (18 countries)	35.2	37.9
Belgium	20.5	20.2
Bulgaria	:	9.7
Czech Republic	12.0	19.1
Denmark	22.4	19.7
Germany	42.3	39.1
Estonia	5.2	7.7
Ireland	7.3	22.2
Greece	20.3	19.8
Spain	51.9	49.3
France	33.1	39.2
Croatia	:	35.6
Italy	26.4	39.6
Cyprus	15.8	18.2
Latvia	13.7	6.3
Lithuania	9.1	5.0
Luxembourg	17.3	22.4
Hungary	11.4	18.0
Malta	7.3	13.4
Netherlands	32.4	43.9
Austria	24.2	24.4
Poland	48.8	50.6
Portugal	36.4	48.0
Romania	4.6	3.6
Slovenia	44.0	48.7
Slovakia	8.3	13.0
Finland	36.1	34.3
Sweden	39.8	41.7
UK	9.0	10.4
Iceland	12.2	31.7
Norway	23.2	19.8
Switzerland	35.4	39.5

Source: Eurostat (2015)

Europe (Koch 2006). However, the crisis has led to the proliferation of part-time jobs in those countries as well (Table 15.4).

Eurostat also surveyed young Europeans about the reasons why they were holding a part-time job. A third of the EU young workers who were interviewed mentioned that the reason was they could not find a full-time job. Underemployment seems a sort of rite of passage for early working life (McKee-Ryan and Harvey 2011). However, differences between countries were extremely wide. Southern European youth expressed their discontent

Table 15.4 Part-time employment as a percentage of the total employment for young people (15–29 years)

Country/area	2005	2013
European Union (28 countries)	18.3	22.8
Euro area (18 countries)	18.0	24.3
Belgium	17.1	19.1
Bulgaria	m. d.	3.6
Czech Republic	3.4	8.1
Denmark	41.9	51.7
Germany	17.3	21.2
Estonia	10.5	12.6
Ireland	16.2	30.2
Greece	7.5	13.9
Spain	15.9	26.5
France	16.0	18.1
Croatia	m. d.	3.7
Italy	14.1	23.2
Cyprus	7.0	19.2
Latvia	8.2	8.6
Lithuania	7.1	9.8
Luxembourg	8.8	16.9
Hungary	3.2	6.4
Malta	9.9	15.2
Netherlands	54.2	63.3
Austria	15.9	20.2
Poland	13.9	9.6
Portugal	6.6	15.8
Romania	11.1	10.9
Slovenia	16.8	21.7
Slovakia	2.2	5.4
Finland	25.6	27.0
Sweden	29.6	36.6
UK	25.8	29.2
Iceland	31.3	39.0
Norway	41.1	43.8
Switzerland	22.8	24.6

Source: Eurostat (2015)

Note: m. d. accounts for missing data

indicating that more than two-thirds of them were holding a fixed-term position due to the unavailability of permanent contracts (Romanians, Spaniards or Greeks, with Italians leading with 79.2 per cent). Similar answers were given regarding fixed-term jobs. From these data, it is not difficult to claim that again the South and East of Europe show a more fragmented labour market, where young people end up finding fewer opportunities to develop themselves in a life project independent from family support.

Finally, in Table 15.5, we include data following an increasing group of young people: the NEETs (not in employment, education or training), one of the most vulnerable groups as their expectations to join a labour market in demand of more complex skills are really low. Authors such as Furlong (2006) have claimed that the concept is problematic once it implies an excessive emphasis on voluntarism. However, it has become widely used and therefore it is relevant to provide the figures, despite the limitations of the concept.

Table 15.5 Young people not in employment and not in any education and training (15–29 years)

Country/area	2005	2013
European Union (28 countries)	15.0	15.9
Belgium	14.0	14.9
Bulgaria	26.8	25.7
Czech Republic	16.9	12.8
Denmark	5.9	7.5
Germany	13.8	8.7
Estonia	13.5	14.3
Ireland	11.8	18.6
Greece	18.7	28.5
Spain	14.0	22.5
France	13.0	13.8
Croatia	17.9	22.3
Italy	20.0	26.0
Cyprus	17.9	20.4
Latvia	13.5	15.6
Lithuania	10.7	13.7
Luxembourg	6.8	7.2
Hungary	17.1	18.8
Malta	15.0	11.3
Netherlands	6.6	7.1
Austria	9.7	8.3
Poland	18.4	16.2
Portugal	12.3	16.4
Romania	18.4	19.6
Slovenia	9.7	12.9
Slovakia	20.2	19.0
Finland	9.5	10.9
Sweden	10.4	7.9
UK	8.8	14.7

Source: Eurostat (2015)

Some research has suggested the importance of challenges this collective implies for future social policies (Eurofound 2011), and some authors have even warned of the risk of a “lost generation” in some countries, particularly in Southern Europe (Pritchard and Whiting 2014).

Young Workers and Their Discourses

As mentioned in the introduction, there is little research on how vulnerability shapes the attitudes and perceptions of young people about the labour market and their possible life trajectories. There has been fieldwork on how young people describe their working experiences throughout Europe in very different contexts (part-time workers, migrant young workers, etc., see Kauhanen 2008; Bloch 2013). In this section, we will try to provide some empirical material through a specific case study of one European country, Spain, in order to grasp some of those perceptions. This is indeed a limited approach as the Spanish context is very different from other countries such as Germany, Finland or the UK. However, Spain shares many common trends with other European countries, particularly the Southern Europeans, and has faced the degradation of labour conditions for young people since the 1980s. In this sense, it represents an extreme and paradigmatic case that is worth studying.

There is an important body of literature reviewing the specific features of the Spanish labour market, which has focused not only on the labour legislation and historical outcomes but also on the social effects of unemployment (Golsch 2004; Alonso and Fernández Rodríguez 2008; López Calle 2007; Prieto 2009; Fernández Rodríguez and Martínez Lucio 2013; Sola et al. 2013). It is important to highlight that the current crisis, while catastrophic and dramatic as it is, has just represented a reinforcement of a structural problem inherited from many decades ago. This means that, despite the drop in salary level or available jobs, there has not been a major change in terms of challenges for young workers: maybe the only real change is that opportunities in the labour market are so few that emigration has returned as an alternative for social and economic improvement (Navarrete 2014). Young workers in Spain have experienced extremely high rates of unemployment and precarious jobs for very long periods, and many have developed career trajectories in which stability becomes increasingly difficult (Golsch 2004; Arnal et al. 2013). Temporary employment rate reached the 30 per cent threshold in the late 1980s and today, represents a quarter of the workforce. For young workers, those figures were usually higher. The spread of low-quality jobs helped to delay the personal projects and transitions to adulthood of several generations

of Spaniards (independence, formation of families, etc.), with a substantial impact on fertility rates and the sustainability of future pensions.

Therefore, a whole generation of young people that has entered into the labour market since the 1980s has had a number of precarious contracts as a sort of “rite of passage” in spite of their skills, degrees or field of knowledge. Unfortunately, and despite periods of economic growth, precariousness has become a trademark of the Spanish labour market and in spite of efforts from different governments, it has never been eradicated. The extensive use of temporary contracts in Spain (24 per cent by 2014, but 34 per cent in 2006) helps to portray a landscape of widespread insecurity in the labour market. In spite of timid legislative efforts to limit the causes that can justify the choice of a fixed-term contract by the employer, the high rate of temporary contracts has remained stable. Reforms have mainly reinforced fixed-term contracts, largely used by companies as well as other types such as training and apprenticeship contracts,⁶ designed to fight against unemployment among young people. The approach has been mostly based on promoting numerical flexibility (Atkinson 1984) and especially contractual flexibility (Boyer 1987). Many labour rights have been eroded by these policies because they have been exclusively addressed to build the foundations of a more flexible labour market, damaging the basis of the so-called “social citizenship” (Turner 2001; Alonso 2007).

In this section, we will discuss how young Spanish people perceived their labour market situation and trajectory. The material draws on a research project developed during the year 2007, just before the crisis, in which nine focus groups were used to analyse young graduates’ perceptions on labour and skills (the results of the research project were published in Alonso et al. 2009). The research focused on analysing young people’s discourses⁷ regarding their university studies, job and career expectations plus adding a discussion about precariousness in the Spanish labour market. We opted to use the well-known technique of focus groups on the grounds that they make it possible to study the ways in which individuals collectively make sense of a phenomenon and construct meanings around it in a group discussion setting (see references such as Merton 1987; Morgan 1988; Alonso 1998). In this chapter, we are using the whole set of focus groups (nine, organized around main cities in

⁶There are two main types of training and apprenticeship contracts in Spain. The “training and apprenticeship” (*contrato para la formación y el aprendizaje*) involves on-the-job training plus some accompanying study, the worker still being in formal education. The contract cannot extend further than three years. The simply called (and roughly translated) “training contract” involves a graduate (with a vocational training or university degree) working in an activity where his/her acquired skills are put into practice. The contract cannot extend further than two years.

⁷Further details about the research and the focus groups selection can be found in Alonso et al. (2009).

Spain) as a unique body of data. The authors of this chapter designed the sample and moderated the meetings, in which questions regarding higher education, skills and the labour market were discussed. The discussions were lively and brought interesting data. The current economic situation might have influenced changes in the way those discourses are articulated, especially after the impact of social movements such as 15-M whose radical democratic critique of the current state of affairs has been widely influential, engaging young people with politics again (Sampedro and Lobera 2014). However, we claim that most of the discourses are still representative of how young degree holders have perceived their position in the labour market, with the only difference of being potentially more negative.

The Labour Market and Human Resource Management (HRM) Policies

Throughout the groups and despite their different backgrounds, there was a consensus about the challenges they were facing in their post-degree years. The young Spaniards were conscious about a labour market featuring too many problems: high youth unemployment, precariousness, “mileurism”⁸ and a substantial number of low-skilled jobs (fuelled by a decade of housing bubble). Their view of the labour market portrayed a situation in which, as one participant said, “almost everyone I know does not have a permanent contract, there is no stability so you can be fired at any time”. Pessimism was strong, as almost all of the participants agreed that “almost everyone I know shares my situation or they are doing even worse than me. I see everything as dark”. Some recognized that some sectors of the economy were doing better than others. However, even highly technologically-oriented firms had also adopted flexible human resource management (HRM) policies that imply that “there is not a single month in which two guys leave and three join and some other three leave the next month”. Every participant agreed that the turnover rates were extremely high in the companies. It was difficult to get a job but it was even more difficult to stay there for a long while.

Moreover, the participants expressed their discomfort with the current HRM policies. On many occasions, there was a reference in the debates to the lack of voice that young graduates have in companies and generally in the business world: one participant mentioned that “companies do not listen

⁸ “Mileurism” was a fashionable term during the last decade, as many young skilled people did not reach the threshold of €1000 salaries per month. During the crisis, salaries have decreased so much that nowadays it is not rare to find lower wages in the labour market.

to you. In the private sector everything was about profits and they were not interested in anything else". If we follow Albert O. Hirschman's theory developed in his classic treatise *Exit, Voice, and Loyalty* (1970), we can claim that according to the graduates, the Spanish businesses were clearly dominated by exit: no voice was permitted and thereby loyalty was blurred. Some examples of this were explained in the groups:

They do not listen to you and the less they hear you the more they like you. The more you talk the worse they consider you. And if they do not hear you they think, well, somebody who does not bother us, it's alright. They are not interested in what you say

According to the interviewees, only some family businessmen/women seemed to care significantly about the workers (in a paternalist way), but generally interviewees felt that their participation in the workplace was always stopped by the managers. Thus, some complained that "once it is not worthwhile, it is better not to care". This lack of compromise did not mean that young graduates do not stick to the long working hours that have become the norm in the Spanish companies. In most of these cases, those extra hours were not paid for: "Too many hours. Once there were two weeks in which I had to be at the job place from 6 am to 9 pm" or "you have to stay more because the work has to be done and the company does not want to hire anybody else". According to the participants, it seemed like these additional (and unwaged) working hours had to be accepted by young graduates in order to have any chance to keep their job at the companies. They also mentioned the many difficulties they found to carry out trade union activities. One participant described the following situation:

I did not dare but another guy tried to start one trade union but soon things were messed up. He was suddenly fired without any reason but you know what the problem was about... They want to have everything under control and they do not want that kind of people... You have a timetable from whatever am to whatever pm but if they need you to stay more you just have to do it. And they don't pay you those extra hours indeed. They say that it is a project that we have to deliver on time and that's it. They don't want complainers but people who feel the company as if it was their own.

Skills and Employability

Unfortunately, it seemed that holding a tertiary education diploma did not help to avoid the precarious situations that lead to these abuses. The participants

also considered that there were too many people with a university degree and that had devaluated their diplomas and thus their position and strength to negotiate: “you can’t throw a stick without hitting 500 graduates”. The over-crowding of certain qualifications was considered to be the main reason for their devaluation. They blamed a culture which had traditionally despised vocational training as “socially discredited” and whose result was a university “where everyone goes” and in which “everybody ends up graduating despite differences in acquired knowledge and skills”. Degree holders complained that after investing in their education, not only were salaries low but also they had joined the labour market much later than other colleagues. In fields such as computing, some programmers claimed “there are guys who have enrolled in vocational training⁹ and have gained more experience so now they earn three times more than me even if they have never stepped in a University classroom”. There was an agreement in all the groups that in the past “vocational training was for losers” and was stigmatized, but now its image has improved and the job insertion is more satisfying than the one from tertiary education. For instance, one of the participants claimed the following:

...when you are young and you mention ‘University’ you aspire to hold a degree or whatever, but you don’t think that maybe joining a vocational training program you would get a job in a much quicker way, even if you would not have a diploma hanging on your wall. It is much more practical, actually.

Life Projects and Frustration

Since the late 1970s, there has been a continuous debate about the logics of credentialism and the devaluation of higher education (Collins 1979). This debate has been particularly intense in Spain (Alonso et al. 2009), where young degree holders are frustrated because they feel they cannot develop their own autonomous life project, with incomes well below the average salary.¹⁰ One of the interviewees mentioned that he knew somebody whose education is based on a vocational training programme and “he has been working for I don’t know how many years already, he is married and has kids... He has a life

⁹The Vocational Training system in Spain is discussed in reports such as the one by Field et al. (2012).

¹⁰This varies a lot depending on the background though: engineers have generally enjoyed better salaries than graduates with a humanities background. However, there have been complaints by degree holders that they earned less than half of what construction workers did, that is, €1000 versus €3000 (Alonso et al. 2009). These figures need to be taken with caution though. After the end of the housing market bubble, the salaries in the construction sector were cut off substantially and many of its former workers have become unemployed.

of his own”, while another participant added that a university degree holder does not have anything yet or that “you put lots of effort in studying while not being rewarded by the labour market”. Nevertheless, other participants mentioned that university degrees mean something more than just getting a job because they are helpful in building the theoretical and empirical foundations required to understand how to perform in a certain knowledge discipline and thus helping to become skilled.

Generally, the young graduates seemed to be very critical about the labour perspectives after university. Some mentioned the low employability of social sciences degrees such as social work, tourism studies or law: in one of the groups, it was mentioned that “I know lots of people who have graduated in different faculties and all of them are unemployed”. There were also complaints about how University degrees seemed to be unable to provide skills with the potential to be applied in the job place. Hence, some participants claimed that “in most of the cases I know including myself nobody who works is using what has been taught during the studies”. Only “practical” knowledge, or knowledge acquired through praxis, would be relevant in this process of becoming skilled. There was a rejection of purely theoretical knowledge. The main argument of the graduates was that university must be essential to assure their employability and they are critical to the current studies in which “you just go there, they teach you lots of theory and knowledge but once you get a job you have to get yourself out of trouble”. Therefore, once the university seemed to fail in the mission of making graduates more employable, the discourse became very pessimistic, to the extent that many claimed that they would not have joined university if they knew before: “we all have finally felt as if we have been cheated, you know? It seems like if I have been studying for nothing”.

The perception of having been deceived was quite pronounced among the focus groups participants, which led many of them to idealize other formative options. For instance, some mentioned that the time spent in the studies would have been better invested in joining vocational training courses or studying an *oposición*,¹¹ as they would guarantee a job even if not necessarily a skilled one. There was also a constant reference to discourses emanating from the “business world” in which daily practices, “management by walking around” and professional experience are considered to be highly positive whereas degrees and theoretical knowledge are despised in a clearly anti-intellectual stance.

¹¹ *Oposición* refers in this context to public examinations, which are the most commonly used form of hiring civil servants in Spain. They are required even for low-skilled jobs in public administration and passing them means, in most of the cases, gaining access to a lifetime job.

Some graduates assumed that discourse and claimed that “life itself teaches more than any university” or “the people who really know say that the best choice is to join the labour market as soon as possible”. *Titulitis* (the excessively high appreciation that Spanish companies would seem to have for formal education in personnel recruitment) was also pointed out by young graduates as one of the biggest problems of the Spanish labour market. In the opinion of most of the participants, *titulitis* forces young people to get over-qualified and this does not mean that they become better workers. One participant mentioned that “you see people with super-degrees (sic), with eighty masters but as they don't have job experience, they can't work with Microsoft Word and they cannot attend even the calls”.

Europe

Frustration was also fuelled by the growing knowledge about European social policies. Some young graduates had either studied through the Erasmus programme¹² in European universities or worked abroad and discovered a different world for young people. It is important to notice that these representations about European youth and social policies were pervaded by a certain idealism that tends to identify Europe with Nordic social democracy. Therefore, in all of the groups, the European North was conceived as an unreachable paradise and the lifestyle of young Northern Europeans highly envied (the same cannot be said about Mediterranean and Eastern European countries which are perceived to have equal or worse social policies for young people). Many interviewees believed that Northern Europeans earned more for the same job and have a much easier access to independence due to housing social policies and lots of public money transfers. Thus, they end up leaving home much earlier and also working part-time while they are studying. The participants also pointed out that:

There are not so many graduates... Most of the people I know abroad have attended vocational training or something similar and they have found a job.

The participants often praised the skills of the young Europeans and especially how well trained they seem to be for the workplace demands (due to training at companies during the studies). The same is true of the USA, where graduates easily become entrepreneurs while in Spain, as one participant mentioned:

¹²The Erasmus programme is a very popular EU students Exchange programme.

People only know how to seek for a job, attend an *oposición*, get a scholarship or start a doctorate, but they are unable to start up a business however easy it is. I find it tragic, actually.

Nevertheless, it is not only the educational or labour skills what they were praising. It is also how much better prepared they are for adult life challenges. The Northern European youngsters were portrayed as brighter, more open-minded and with fewer limitations: one participant said that “they are younger than us but they have travelled much more, they speak many languages unlike here and they seem smarter”. The inferiority complex was particularly strong in relation to language skills, and many graduates highlighted that “they speak English, Spanish and some more languages whereas here we barely speak a broken English” or “even in Portugal they are more fluent in languages than here”. In the opinion of the graduates, an additional cultural problem worsened the situation: people are unable to start from zero like other Europeans do. There appeared to be a Spanish mindset in which “we all want to have a flat of our own, a car, etc. just like when we were living with our parents. And things don’t work like that, if you really want to start from zero you have to start from zero”. These expectations meet with the lack of social policies to stimulate independence, and while there was a clear bias in the perception of Spanish young graduates, they also showed a discontent with their situation in comparison with other Europeans. One participant expressed this in a very clear way: “I believe the system out there is fairer with them”.

Pessimism

In spite of being conscious about the challenges they are facing, in all of the focus groups, many young graduates seemed to show a certain resignation. Many were convinced that the Spanish labour market simply has too many people with a degree, claiming that “in my generation there are more people with than without it a university degree” so it is logical to have worse jobs. Some recognize that they did the studies out of habit and accept that Spanish young people are not too demanding; middle-class parents have pushed many people to study because it is socially prestigious; and young people in Spain are too lazy as “they are happy to be at home with mummy and daddy with all the expenses covered”. They showed a strong pessimism regarding the future, thinking that nothing is going to change in the next years. However, other graduates were very eager to express their complaints about their current labour situation:

You think well, I'll find something better but time goes by and you end up having the same shitty jobs... they have sold us out, raising us to go to university because it was the way of getting a good job, earning so much that you could buy yourself a flat and a car.

The failure to meet these social expectations had created a common frustration shared by almost everyone in the groups. Graduates tried to find something to blame for it and pointed at politicians, the abuse of personal connections and the universities which are unable to provide them with adequate skills for the job place. The latter was also blamed for “producing” too many graduates. Nevertheless, there was a certain feeling of confusion which led some of the participants to recognize that in the end “you are not sure who is really accountable for this situation”.

In sum, according to these focus groups, it seemed like young graduates felt very helpless and confused about how to cope with the challenge of precariousness in the labour market (Alonso et al. 2009), pushing individualist strategies and creating resentment among young people. However, the current scenario shows a very different context in which calls for change seem to be on the way. Spain has experienced a dramatic crisis for more than seven years and the brutal economic and social collapse has launched new social movements (15-M, the political party *Podemos*) which have changed the political and social atmosphere of the country. However, it is still too early to guess if these developments might influence the structural problems and shortcomings of the Spanish labour market.

Is the Spanish case maybe too extreme? Certainly, it might be in the EU context. However, looking at countries such as Portugal, Italy or Greece, the social situation is similar and while there are not many reports in English to compare with, it might be likely that the young share many points of view. Moreover, the perception of the degradation of the labour market is shared not only by Southern Europeans hit by the crisis but also by young people in other latitudes, as bad jobs and poor employment conditions seem to proliferate everywhere (Hewison and Kalleberg 2013; McDonald et al. 2012). The world is still suffering the effects of the global recession and the collapse of the financial markets and it seems like there is still a hard road to follow. Higher unemployment rates and lower-quality jobs seem to have become the current landscape for young people. This might represent a serious challenge for European and national authorities, and despite EU initiatives to tackle unemployment (Youth Guarantee Implementation Plans, EURES Portal), few results have been achieved amidst the ongoing economic crisis.

Conclusion

In this chapter, we have highlighted that non-standard employment in Europe is very much related to precarious and low-quality jobs, particularly for young people. However, the situation is very different in different parts of Europe. Maybe with the exception of the Nordic countries, we are witnessing an expansion of non-standard employment that, in some countries, has led to the creation of a dualist model with stable and precarious workers. Young people are holding many of those non-standard jobs and face a hard future. In countries like Spain, the labour market has become much more sensitive to the economic cycles, suffering a fast destruction of jobs in downward periods. In this frame, the temporary workforce becomes a protective barrier for companies as they can easily reduce costs once there is a sudden decrease in their sales and activities. This has favoured a managerial philosophy in which human resources are more likely to be considered costs rather than assets and thus introduced an enormous uncertainty among young people, the main group affected by these flexible policies. This trend is seen in other countries as well.

Overall, the data shows a great divide in Europe that could be linked to the different social outcomes different models of capitalism provide (Hall and Soskice 2001; Gallie 2007). On the one hand, we have countries from the so-called North, linked to continental or liberal traditions regarding Welfare State, a long tradition of industrial activity and high added-value economic orientation. On the other hand, we have the South-East of Europe, Mediterranean countries and former socialist Eastern European countries, both of them sharing an authoritarian political past, weaker institutional frameworks and less-developed economies, despite the wealth of some of their regions. This great divide seems to be increasing during this period of economic crisis, affecting dramatically the expectations and trajectories of young workers, particularly in those areas of Europe with weaker economies.

Given the situation of young people in the labour market, enjoying many of the so-called bad jobs (due to cost-cutting and pro-flexibility managerial strategies), it is relevant to address an important question: what role have the trade unions played in this situation? There is indeed an important link between the situation of young people and their capacity to influence unions' actions (Hodder and Kretos 2015). It has been claimed by some scholars (see e.g. Pakulski and Walters 1996) that young people are poorly unionized because of new individualist attitudes embedded in postmodern values. It has been claimed that young people would not feel identified with their class in a context of "end of work" (Rifkin 2004) and would rather feel identified with

forms of socialization linked to the spheres of consumption and emotions. Hence, young people would not feel attached to old forms of labour organization. Moreover, the proliferation of so-called “bad jobs” (Kalleberg 2009) and non-standard contracts would dramatically impact the relation between young employees and unions, which would result in lower rates of unionization among workers under 30 years.

However, the picture is more complex. Surveys carried out in different countries show that young workers maintain a positive view on unions, when compared with other age cohorts. The reasons why their membership figures are lower are the result of other factors, particularly their position in the labour market, linked to unstable jobs in the service sector (Furåker and Berglund 2003; Tailby and Pollert 2011; Vandaele 2012; Waddington and Kerr 2002). Therefore, poor unionization of young employees is actually the result of a twofold process. On the one hand, their fragile position in the labour market, deeply affected by non-standard employment forms (Bradley and Devadason 2008; Koch and Fritz 2013), and the growth of precarious jobs (Kretos 2010; Standing 2011; Fernández Rodríguez et al. 2015). On the other hand, the failure of trade unions to deploy strategies to engage and organize these workers (Johnson and Jarley 2005). There are indeed many challenges for European trade unions, which face the task not only of organizing these workers and changing their attitudes towards the unions (Lowe and Rastin 2000) but also of defending the minimums of labour rights and welfare policies in a difficult economic context. Meanwhile, young workers face a challenging situation, with the prospects of unemployment, precariousness and emigration as possible trajectories, and a weakening of their work and employment-related collective representation.

In this context, young workers have become the victims of the degradation of labour conditions and seem to have no expectations to live with better conditions than the previous (Fordist) generation (Alonso and Fernández Rodríguez 2008). Precarious labour has become the only employability norm and the high unemployment figures show a difficult scenario for young people: the alternatives seem to be for many to remain unemployed or work in precarious conditions. Both objectively (labour market figures, salaries, delayed emancipation) and subjectively (with a pessimistic view of the future and a certain fatality with no expectations) young people seem to be very aware that there are important challenges that they still have to face in order to develop their vital projects. Were they born to be precarious? The way political institutions are able to respond to that question and to the challenges that the current economic crisis is posing will determine not only the future of the younger generations but in the long run, the social, economic and

political future of Southern and East European countries and, who knows, maybe even Northern European ones.

Future research on this topic should cover the many sides and different aspects of young employment conditions. Some relevant issues might be the following:

- The relation between precariousness and the current model of consumption and its subsequent model of labour. The rise of a low-cost society has been linked to the stagnation of wages and a culture where consumption prevails over labour identity, eroding the idea of labour citizenship.
- The debates between employers and employees about the real meaning of skills, the needs of the labour market and the role companies should play regarding training.
- Exploring unconventional young workers' trajectories using case studies. The case of entrepreneurs is particularly fascinating.
- The trends of labour mobility among young people would be also an important topic that deserves further exploration.
- New forms of unionization as well as engagements with new social movements.
- Most of the research has currently focused on the consequences of the crisis and the effects unemployment and precariousness has had on the collective of young people. However, the scenario might change in the future if there is new economic boom in Western countries. A new agenda for the youth might emerge and scholars should be aware of new topics that might become critical (sustainability, new forms of labour, unionization, new balances between employment and family, new social movements, etc.).

In sum, it is important to build a solid bridge between youth studies and the research of general trends of the current economic model, which is pushing societies to higher levels of inequality. In this project, scholars should make critical contributions that can guide to new economic and social policies.

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Part IV

Ageist Attitudes

16

Ageist Attitudes

Jean McCarthy and Noreen Heraty

The ageing workforce has been described as the defining social issue of the twenty-first century (Pitt-Catsouphes 2007), prompting a recent global policy orientation towards extending working life and encouraging 'older' workers to remain in the labour force. While there is no agreement on a definition of an 'older' worker, there is a broadly shared view that, in the workplace context at least, one becomes identified as 'older' somewhere between the chronological ages of 50 and 55 years of age (McCarthy et al. 2014). The continued labour force participation of these 'older' workers is now recognised as critical in facilitating economic growth (DELSA 2006; Feyrer 2007) and reducing fiscal strain on national pension and social protection systems (Heraty and McCarthy 2015). It is steadily emerging, however, that many organisations across the globe have serious reservations about employing 'older' workers, to the extent that negative attitudes towards older workers now appear widespread (DELSA, 2006; Posthuma and Campion 2009). As a result, the study of ageist attitudes at work has been the focus of considerable research effort in recent years. The intention of this chapter is to review relevant literature that is pertinent to our understanding of such attitudes in the workplace. We first address the nature of attitudes, and more specifically, the nature of

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attitudes towards ‘older’ workers, before exploring theoretical perspectives on the determinants of ageist attitudes at work; we conclude with recommendations for future research.

The Nature of Attitudes

There are numerous definitions of the term ‘attitude’: from Allport’s (1935: 810) classic conceptualisation of an attitude as ‘a mental and neural state of readiness, organised through experience, exerting a directive or dynamic influence upon the individual’s response to all objects and situations with which it is related’ to more recent classifications, such as Eagly and Chaiken’s (1993: 1) ‘psychological tendencies that are expressed by evaluating a particular entity with some degree of favour or disfavour’. This particular definition is considered the most ‘conventional’ in the contemporary attitudinal literature. Despite subtle differences across the evolution of study on the concept, most researchers in the field have emphasised the evaluative aspects of an attitude (see Table 16.1) in that an attitude involves the expression of an evaluative judgement about an object. Indeed, as Maio and Haddock (2010: 4) state, ‘most attitude theorists would argue that evaluation is the predominant aspect of the attitude concept’.

Furthermore, Eagly and Chaiken (1993, 1998) suggest that when attitudes are conceptualised as evaluative judgements, they can vary in two central ways: first, attitudes differ in terms of valence, in other words, they can be positive or negative and second, attitudes differ in strength, consequently an individual can feel less or more strongly about an object than others. ‘People

Table 16.1 Evaluative nature of attitudes

Author(s)	Attitude definition
Bogardus (1931: 62)	‘An attitude is a tendency to act toward or against something in the environment, which becomes thereby a positive or negative value’
Thurstone (1931: 261)	‘The affect for or against a psychological object’
Smith <i>et al.</i> (1956: 41)	‘(attitudes) provide a ready aid in “sizing up” objects and events in the environment’
Zanna and Rempel (1988: 13)	‘The categorisation of a stimulus object along an evaluative dimension’
Eagly and Chaiken (1993: 1)	‘A psychological tendency that is expressed by evaluating a particular entity with some degree of favour or disfavour’
Fazio (1995: 247)	‘An association in memory between a given object and a given summary evaluation of the object’

are sensitive to covariations that they observe between the presence of a given object and the presence of related positive and negative cues' (Fazio et al. 2004: 294).

Certainly, an underlying assumption across the literature is that an attitude can be reduced to the net difference between the positive and negative stimulations associated with an object (Allport 1935; Thurstone 1931). Likewise, people's feelings about an object can vary 'anywhere between two endpoints: maximally positive (and minimally negative) to maximally negative (and minimally positive)' (Cacioppo and Bernston 2004: 401). Shook et al. (2007) found that extreme attitudes are more influential and are thus given more weight than mild attitudes. As such, strong attitudes are considered consequential; these attitudes can be resistant to change, persistent over time and predictive of behaviour (Eagly and Chaiken 1993; Pomerantz et al. 1995). While there has been considerable debate about the attitude-behaviour relationship, it is commonly acknowledged that an attitude is a predisposition to behave in a particular way (Fazio 1986, 1995; Procter 2003), and, as Schuman et al. (1997: 6) point out, 'if attitudes and behaviours existed in entirely different spheres, learning about attitudes would be of little practical value, whatever their interest from the standpoint of intellectual understanding. But careful reviews of a wide range of past studies, as well as specific experimental research, make it clear that this is not the case. Attitudes and relevant behaviour at the individual level are usually correlated to some extent'.

Moreover, attitudes are generally considered to comprise cognitive, affective and behavioural components. The cognitive domain refers to the beliefs about the probability that an object is associated with a given attribute (Fishbein and Ajzen 1975). Affect encompasses an overall emotional feeling concerning an object (Berkowitz 2000), and behaviours are generally defined as the intended actions of an individual (Fazio 1986, 1995). For example, Triandis (1971: 2) explains this 'tripartite view' that an 'attitude is an idea (the cognitive component) charged with emotion (the affective component) which predisposes a class of actions (the behavioural component) to a particular class of social situations'. More recently, Eagly and Chaiken (1993, 1998) extend this view to propose that this tripartition best represents the types of responses that allow researchers to identify attitudes because individuals' attitudes are shaped based on their cognitive, affective and behavioural responses to an object. Individuals express their attitudes by means of holding certain beliefs about an object (cognitive domain), feeling a certain way about an object (affective domain) and intending to behave in a certain way (behavioural domain). It is suggested, therefore, that an attitude is actually an 'evaluative summary' of the information derived from these bases (Fabrigar et al.

2005; Zanna and Rempel 1988), rather than simply ‘consisting’ of cognitive, affective and behavioural elements. While these components are recognised as being empirically distinct, they are often ‘directionally consistent’, for example, positive beliefs about a social group can be associated with positive feelings about the group, and in turn, linked with positive behavioural intentions towards this group (Breckler 1984; Zanna and Rempel 1988). We now turn to the nature of attitudes specifically with respect to age.

The Nature of Ageist Attitudes

We have seen that evaluation is the predominant tenet of an attitude, and Nelson (2005) proposes that people automatically evaluate other people along three particular dimensions: race, gender and age. As people categorise others along these dimensions, often they develop attitudes. Attitude research has suggested that age is one of the first characteristics we notice about other people (Kite et al. 1991; Fiske 1998; Cuddy and Fiske 2002). Research has also demonstrated that attitudes are more negative towards older than younger adults (Palmore 1999; Kite et al. 2005). That is, that ageism exists. Ageism has been described as the third great ‘ism’, following racism and sexism, but has received much less attention across the bias literature (Blancato and Ponder 2015; Shore et al. 2009). Duncan (2001) notes that there has been less focus on preventing discrimination from ageist attitudes than on discrimination from racist and sexist attitudes. He believes that this is rather ‘ironic’ (Duncan 2001: 26), especially considering that ageist attitudes have the potential to affect everyone as they get older, not just members of one particular race, sex or other demographic grouping (Achenbaum 2015). Robbins (2015) suggests that the lack of attention to ageism in comparison to racism and sexism is because ageism is often ignored or, indeed, even accepted in modern society, and this is, of course, ‘the pernicious problem of ageism’ (p. 6).

Butler’s (1969) seminal work coined the term *ageism* to refer to evaluative judgements towards a person or persons simply due to their advanced age. Here, he states that ageism comprises three interrelated aspects: prejudicial attitudes towards older persons, old age and the ageing process; discriminatory practices against older people; and institutional practices and policies that perpetuate stereotypes about older adults (Butler 1969, 1980). In their review of the concept of ageism, however, Iversen et al. (2009: 8) state that ‘it is problematic that many researchers are still using this definition as the basis of empirical studies’. First, Butler’s (1969, 1980) definition implies that only ‘older’ people experience ageism. ‘Younger’ people, too, can be subjected

to evaluative judgements and negative attitudes based on their perceived ‘youth’. Second, Butler’s (1969, 1980) definition does not use the classic cognitive–affective–behavioural tripartition because the cognitive component is not included. Instead, it focuses on prejudicial attitudes (affective domain), discriminatory practices and institutional practices (behavioural domain). Although ageism has been defined using the tripartite view by some theorists, Iversen et al. (2009) point out that many of these definitions do not explicate the tripartite structure. The tripartite structure of ageism is perhaps more comprehensively depicted by Kite and Wagner (2004), who identify that ageist attitudes comprise an amalgam of stereotypes (cognitive domain), prejudice (affective domain) and discriminatory intentions (behavioural domain). In addition to the tripartite view, it has also been acknowledged that ageist attitudes comprise positive and negative components, and can be both explicit (conscious) and implicit (unconscious) (Cuddy and Fiske 2002; Levy and Banaji 2002; Malinen and Johnston 2013). Palmore (1999) and Solem (2007) further make a distinction between ageism on an institutional level (as referred to by Butler 1980) and ageism on an individual level. Institutional ageism refers to an overall climate of ageism among members of organisations and institutions, including organisational policies and practices which serve to negatively affect individuals with respect to their age. Individual ageism, on the other hand, represents the ageist attitudes held by individuals in society. Table 16.2 provides the range of definitions of ageism that have been proposed over the past 50 years.

Seeking to offset the inconsistency among theorists on the complexity of ageist attitudes, and with the purpose of providing clarity and accuracy on the concept, Iversen et al. (2009: 15) offer this definition of the term: ‘Ageism is defined as negative or positive stereotypes, prejudice and/or discrimination against (or to the advantage of) people on the basis of their chronological age or on the basis of a perception of them as being “old” or “elderly”. Ageism can be implicit or explicit and can be expressed on a micro-, meso-, or macro-level’.

We argue that this particular view of ageism is, perhaps, the most comprehensive, and indeed, the most practical definition in the literature to date for a number of reasons. First, the traditional social psychological tripartite view of attitudes is encompassed in the cognitive–affective–behavioural domain; second, it recognises that attitudes can be both negative and positive; third, the conscious (explicit) and unconscious (implicit) elements of ageism are acknowledged; additionally, this definition makes specific reference to the perceptual nature of how individuals categorise people by age. Most significantly, the operation of ageist attitudes at the individual (micro) level, the

Table 16.2 Definitions of ageism

Author	Definition
Butler (1969: 243)	'Age discrimination or age-ism is prejudice by one age group toward other age groups'
Butler (1980)	(1) Prejudicial attitudes towards older persons, old age and the ageing process, which includes attitudes held by older adults themselves; (2) discriminatory practices against older people; and (3) institutional practices and policies that perpetuate stereotypes about older adults, reduce their opportunity for life satisfaction and undermine their personal dignity
Bytheway (1995: 14)	'Ageism is a set of beliefs originating in the biological variation between people and relating to the ageing process. It is in the actions of corporate bodies, what is said and done by their representatives and the resulting views that are held by ordinary ageing people, that ageism is made manifest. Ageism generates and reinforce a far and denigration of the ageing process, and stereotyping presumptions regarding competence and protection. In particular, ageism legitimises the use of chronological age to mark out classes of people who are systematically denied resources and opportunities that others enjoy, and who suffer the consequences of such denigration, ranging from well-meaning patronage to unambiguous vilification'
Palmore (1999: 4)	'I define ageism as any prejudice against or in favour of an age group. Prejudice against an age group is a negative stereotype about that group (such as the belief that most old people are senile), or a negative attitude based on a stereotype (such as a feeling that old age is usually the worst time in life). Discrimination against an age group (such as compulsory retirement) ...But there is also positive ageism: prejudice and discrimination in favour of the aged'
Cuddy and Fiske (2002: 4)	'Category-based attitudes...are represented as prejudice (affective), discrimination (behavioural), and stereotyping (cognitive). Ageism contains the three same mechanisms'
(Greenberg et al. 2002: 27)	'Ageism can most simply be defined as negative attitudes or behaviours toward an individual solely based on that person's age'
(Levy and Banaji 2002: 50)	'We define ageism as an alteration in feeling, belief, or behaviour in response to an individual's or group's perceived chronological age'
Wilkinson and Ferraro (2002: 340)	'The definition of ageism that has become most widely accepted is prejudice and discrimination against older people based on the belief that aging makes people less attractive, less intelligent, sexual, and productive. Prejudice refers to attitudes while discrimination focuses on behaviour. Institutional discrimination refers to a bias in actions inherent in the operation of any society's institutions...While ageism is generally thought to be negative, it can also be positive'

(continued)

Table 16.2 (continued)

Author	Definition
Solem (2007: 111)	'When the beliefs and feelings are connected to discriminatory behaviour against elderly people, we talk about age discrimination. These three components of attitudes: the cognitive (beliefs about elderly people), the affective (feelings for the elderly) and the behavioural (acts toward the elderly), could be subsumed under the concept of ageism, even if the concept are used in different ways, also about discrimination against young people and both negative and positive discrimination. Ageism may be expressed in inter-individual interaction, but may also be inherent in social and material structures'

social network (meso) level and the institutional and cultural (macro) level are particularly useful in studying ageist attitudes at work because ageist attitudes can exist among individuals, in groups and teams, among professions and within professional networks, and can permeate industry, organisational and societal cultures. We do have one criticism, however, where we believe that this definition is limited by its focus on 'old' or 'elderly'. Where ageism has also been found to exist against 'younger' and indeed 'mid-life' adults, we advocate for the removal of the phrase 'or on the basis of a perception of them as being "old" or "elderly"' in this definition, instead using 'or on the basis of a perception of them as being "old" or "elderly", "young" or "mid-life"'.

Ageist Attitudes in the Workplace

In the work environment, research shows that negative attitudes about older employees exist (cf. Tuckman and Lorge 1952; Kirchner and Dunnette 1954; Bird and Fischer 1986; Hassell and Perrewe 1995; Chiu et al. 2001; Kite et al. 2005; Loretto and White 2006; Posthuma and Campion 2009; Ng and Feldman 2012) to the extent that we can say ageism exists in many organisations. Where ageist attitudes comprise stereotypical, prejudicial and behavioural components, it appears that stereotypes of 'older' workers have been the central focus of previous research on age-related attitudes in the workplace.

Stereotypes

Workplace age stereotypes are beliefs and expectations about workers based on their age (Hamilton and Sherman 1994; Posthuma and Campion 2009). The

term ‘stereotype’ is attributed to the Parisian printer, Didot, who first used the word in 1798 to describe a printing process that created reproductions using moulds (Ashmore and Del Boca 1981). This expression has evolved into a metaphor for mental reproductions of reality (Nelson 2004). As such, generalised beliefs individuals have about members of particular groups in society are usually labelled as stereotypes. As Lippman (1922: 81) stated, ‘for the most part we do not first see, and then define; we define first and then see. In the great blooming, buzzing confusion of the outer world we pick out what our culture has already defined for us, and we tend to perceive that which we have picked out in the form stereotyped for us by our culture’.

As we see here, Lippman (1922) likened stereotypes to ‘pictures in the head’ which come to mind quickly when we think about groups or members of groups in society, believing that these ‘pictures’ help us make sense of our world and our reality. Zanna and Olson (1994) emphasise the general agreement that stereotypes are beliefs; more specifically, a stereotype is a cognitive construct (Fishbein and Azjen 1975). Stereotypes, however, are recognised as a ‘relatively simplex cognition, especially of a social group’ (Krech et al. 1962: 67), which is exaggerated. Age-based stereotypes generally regard old age as a period of poor health, loneliness, resistance to change as well as declining physical and mental abilities. Bytheway (1995) found that when people are defined as old, they are often categorised as senile, rigid, old-fashioned and inferior. Palmore (1999) identified nine major stereotyped characteristics associated with ‘older’ people as illness, impotency, ugliness, mental decline, mental illness, uselessness, isolation, poverty and depression. Although mostly negative, positive stereotypes about ‘older’ people also exist, where they are labelled as, for example, kind, wise, dependable, affluent and powerful (Palmore 1999). Further, Cuddy et al. (2005) proposed their ‘Stereotype Content Model’ to highlight that ‘older’ people are often stereotyped along two dimensions: competence and warmth. The warmth dimension is characterised by positive traits such as friendliness and honesty and by negative traits such as coldness and untrustworthiness. The competence dimension, then, is characterised by positive traits such as assertiveness and intelligence and by negative traits such as inefficiency, indecisiveness and laziness (Cuddy et al. 2005). It is now understood, therefore, that stereotypical beliefs about groups are usually not entirely negative (or positive), but contain a mixture of positive and negative elements (Fiske et al. 2002).

Stereotypes of ‘older workers’, however, attribute mostly negative work-related characteristics to this group (Posthuma and Campion 2009). For example, ‘older’ workers are seen as being resistant to change and having a lower physical and performance capacity (Rosen and Jerdee 1977; Gordon

and Arvey 2004), being less motivated (Craft et al. 1979), less able to handle criticism (Tuckman and Lorge 1952), making fewer contributions to the organisation with a lower potential for development (Perry and Varney 1978), unable to work in teams (Lyon and Pollard 1997) and less economically beneficial (Finkelstein et al. 2000) than younger workers. Hayward et al. (1997) found beliefs that 'older' workers are harder to train than younger workers as well as being too 'cautious' at work. Some positive stereotypes about older workers have also been found in the literature (e.g. Kluge and Krings 2008). For example, 'older' workers are perceived to be more reliable (Hayward et al. 1997), more conscientious (Warr and Pennington 1993), with lower rates of absenteeism (Broadbridge 2001; Hedge et al. 2006) and better people skills (AARP 2000) than 'younger' workers.

Interestingly, discussions about stereotypes of 'older' workers often draw comparisons with 'younger' workers, but relatively little is known about stereotypes of 'younger' workers, and this is a limitation of our understanding of ageist attitudes. Ageism is not limited to 'older' workers, as it also affects 'younger' workers who may be stereotyped as being too young, as well as lacking the necessary skills and experience for particular roles (Snape and Redman 2003). For a discussion of emerging research on age stereotypes as they relate to 'younger' workers, please see the chapter by Nadler et al. in this volume.

While stereotypes have been the most widely researched component of ageist attitudes at work, it is now accepted that attitudes about groups may not be derived solely from stereotypical beliefs (Haddock and Zanna 1998). We have already discussed how ageist attitudes comprise not only stereotypical beliefs but also prejudicial feelings and behavioural predispositions. Accordingly, the following section places an emphasis on affective (prejudice) and behavioural (discriminatory predispositions) attitudes towards 'older' workers.

Affective and Behavioural Attitudes

Affective attitudes encompass individuals' overall emotional feelings concerning an object (Berkowitz 2000; Fiske et al. 2002), while behavioural attitudes are generally defined as the intended actions of an individual towards an object (Fazio 1986, 1995). With respect to ageist attitudes, affect represents prejudicial feelings, while behaviour represents discriminatory predispositions, towards an individual based on their age or a perception of their age (Kite and Wagner 2004; Iversen et al. 2009). Much of the research on ageism, however, has been criticised for assessing only the cognitive components of

ageist attitudes, namely, stereotypes (Fraboni et al. 1990; Rupp et al. 2005; Finkelstein and Farrell 2007), where the affective and behavioural components of ageist attitudes are often neglected.

Finkelstein and Farrell (2007: 76) note that the affective component of attitudes towards 'older workers' appears to be the 'least consistently conceptualised and measured in the bias literature', where efforts to separate affect from cognition and behaviour are only now beginning to be discussed. We add that research on affective attitudes towards 'younger' or 'mid-life' workers is also lacking. Discrimination itself, in terms of actual behaviour towards 'older' workers, has provided some focus in the literature because it is acknowledged that it exists. First, some workers perceive that they are discriminated against because they are 'older', leading to an increase in age lawsuits across the globe. It is also now recognised that the categorisation of workers as 'older' has a negative impact on the employability of this group of workers (McCarthy et al. 2014). Discrimination against 'older' workers has been established in employment-related outcomes such as selection, participation in training and opportunities for promotion. Raza and Carpenter (1987) found that age was negatively related to hire-ability, while Kanfer et al. (2001) demonstrated that 'younger' people reported a greater likelihood of becoming re-employed than 'older' people. There is also evidence to suggest that 'older' workers are less likely to gain access to training and development opportunities at work, and may also be more likely to be passed over for promotion in favour of younger employees (Palmore 1990). Further, 'older workers' are considered more likely to be selected for redundancy than younger age groups (Snape and Redman 2003), where supervisors are not in favour of employees working up until retirement age (Henkens 2000). Experiences of age discrimination have been found to be increasingly common for 'younger' employees, with under-25s being twice as likely to experience age-based discrimination compared to individuals in other age categories (Snowdon 2012).

However, there appears to be a lack of systematic empirical evidence on assessing people's actual discriminatory predispositions, in other words, their intentions to (or not to) discriminate (Chiu et al. 2001). Many studies concerning age discrimination are limited to discussing age stereotypes. Yet, we know that these attitude constructs are conceptually and empirically distinct. Stereotypes, of course, are often seen as a precursor to discriminatory behaviours (Dovidio et al. 1996), but research suggests that attitudes based on emotion can be stronger, or at least more stable, than attitudes based on beliefs (cf. Edwards 1990; Edwards and Von Hippel 1995; Giner-Sorolla 2001). Moreover, behaviour is thought to be affectively driven (Esses and Dovidio 2002). This reinforces the need to address the affective and behavioural

dimensions of ageist attitudes, where these components are seen as ‘important to measurement in future research on age bias – especially workplace bias’ (Rupp et al. 2005: 356).

Measuring Ageist Attitudes

Much of the literature on attitudes is specifically concerned with the development of instruments designed to measure attitudes, and while there has been much debate on the measurement of the attitude construct, Thurstone (1928: 530) wrote: ‘It will be conceded at the outset that an attitude is a complex affair which cannot be wholly described by any single numerical index. Nevertheless, we do not hesitate to say that we measure a table... Just in the same sense we shall say here that we are measuring attitudes. We shall state or imply by the context the aspect of people’s attitudes that we are measuring. The point is that it is just as legitimate to say that we are measuring attitudes as it is to say that we are measuring tables or men’.

Anderson (1981) notes that information about individuals’ attitudes can be measured in two fundamental ways: either through observational methods (the indirect approach) or through self-report methods (the direct approach). Research involving indirect measures of attitudes typically takes place within a laboratory setting, using techniques such as word association tasks (Fazio et al. 1995), the implicit association test (Greenwald et al. 1998) and recall of stimuli (Schneider 2005); however, participants are usually unaware of what is being measured. While indirect methods have been successful in predicting unconscious bias (Dovidio et al. 1997), these types of methods obviously have huge implications for feasibility in terms of resources and practicality, as well as ethical considerations for the participants.

The direct approach, on the other hand, assesses attitudes using self-report methods, where participants are normally aware of the types of attitudes that are being measured, and have control over the measurement outcome (DeHouwer and Moors 2010). These self-report methods usually comprise a series of questions or statements about an attitudinal object, where participants are asked to give an evaluation of this object, which is then recorded (Anderson 1981; DeHouwer and Moors 2010). Problems inherent in the direct approach relate to the potential misinformation provided by the participant because of a desire to respond in a socially acceptable manner. However, Karpinski and Hilton (2001) and Dovidio et al. (2002) demonstrated that direct methods for measuring individual attitudes were better in predicting individual choices than indirect methods, while Griffiths (1999) stated that

direct approaches do not restrict research paradigms, nor do they require the types of resources associated with laboratory research, and are therefore suitable in organisational research.

Although researchers over the past few decades have developed various, and mostly unidimensional, scales measuring attitudes towards older people in general (cf. Rosencrantz and McNevin 1969; Fraboni et al. 1990), few of them have constructed scales specifically measuring attitudes towards 'older', or indeed 'younger', workers directed at organisational decision-makers. Those that have, place an emphasis on stereotypical attitudes of older workers. A number of published measures on stereotypes of 'older' workers have been advanced based on the work of Tuckman and Lorge (1952), Kirchner and Dunnette (1954), Bird and Fischer (1986), Hassell and Perrewe (1995) and Chiu et al. (2001). Measures concerning the affective dimension of attitudes towards 'older' people exist (Fraboni et al. 1990; Rupp et al. 2005) but, to the best of our knowledge, no measures exist to assess the prejudicial attitudes towards 'older' (or 'younger') workers more specifically. Finally, measures concerning the behavioural dimensions of attitudes towards 'older' workers have been advanced by Chiu et al. (2001), but these are limited to single-item measures. We call for the development of instruments which seek to measure the cognitive, affective and behavioural dimensions of ageist attitudes within the decision-making context at work.

Influential Factors

Ageist attitudes towards 'older' workers in organisations have been found to exist particularly within an employment-related decision-making context (cf. Hassell and Perrewe 1995; Shore et al. 2003; Posthuma and Campion 2009). Several characteristics of this decision-making context appear to have some influence on the positive or negative nature of ageist attitudes at work, including the individual characteristics of raters (the decision-makers) themselves and the characteristics of the organisation within which this decision-making occurs.

Individual Factors

As noted earlier in this chapter, attitudes can vary in terms of valence and strength, such that an individual can feel more or less favourable towards an object than others (Eagly and Chaiken 1993, 1998). A number of studies have examined whether the age of the rater (the individual evaluating a group)

influences their attitudes towards 'older people' or towards 'older workers'. Rothbaum (1983) and Chasteen et al. (2002), for example, found that older raters held more positive attitudes towards older people, while Bird and Fischer (1986), Hassell and Perrewe (1995) and Chiu et al. (2001) found that older employers held more positive stereotypes towards 'older' workers than did 'younger' employers. These findings are often attributed to Social Identity Theory (Tajfel and Turner 1979; Ashforth and Mael 1989), where individuals can derive a sense of belongingness and worth from their membership in social groups, and so, they are more likely to hold more favourable attitudes towards members of their own social group. 'Older' employers in the findings noted above, may therefore derive a sense of identity with 'older' workers, and hence be inclined to evaluate them in a more favourable light. Findings from research, however, do not always indicate that 'older' raters will favour 'older' workers. For example, Finkelstein and Burke (1998) found that older raters demonstrated no preference for 'older workers' over younger workers. Kite et al. (2005), on the other hand, found that older individuals stereotype 'younger workers' as more competent than 'older workers'. The evidence in this area of research is certainly mixed, but it nonetheless demonstrates, that in some cases, attitudes towards 'older workers' can be influenced by the age of the person evaluating these 'older workers'.

There is also some evidence to suggest that gender considerations are an important factor, where female employers have been found to hold more positive beliefs about 'older workers' than male employers (Kogan and Shelton 1962; Rosen and Jerdee 1976; Connor et al. 1978; Kalavar 2001; Rupp et al. 2005). The only explanation for this finding offered in the literature thus far is that it may be partly due to higher levels of expressiveness in personality on the part of women (Deaux 1985; Rupp et al. 2005). As such, women are believed to be less critical and more caring than men. The possible gender effect on ageist attitudes therefore warrants further attention (Rupp et al. 2005) as it appears, in some cases, to be significant, but less understood.

Additionally, two of the most widely cited studies on attitudes towards 'older workers' by Kirchner and Dunnette (1954) and Bird and Fischer (1986) found that supervisors held more negative stereotypes of 'older workers' than did rank-and-file employees. This evidence was later supported by both Hassell and Perrewe (1995) and Chiu et al. (2001) in their investigations. The position or status of a rater within an organisation is therefore purported to influence the nature of attitudes towards 'older workers' from these findings. Both Hassell and Perrewe (1995) and Chiu et al. (2001) implied aspects of Social Identity Theory (Tajfel and Turner 1979) when they offered an explanation for the influence of rater position. Hassell and Perrewe (1995:

466), for example, offered that, 'Although speculative, because supervisors may be "older" themselves, they psychologically may deny membership in that category to protect their work identity and status. Older supervisors may perceive themselves to be contributing and valued members of the organisation, thus, they may not want to be viewed as an "older" employee. In order to separate themselves from the older workers, however, they may negatively stereotype them'.

Organisational Factors

Perry and Parlamilis (2005) argue that the influence of organisational factors on age bias in the workplace have been relatively ignored across the literature, being far less understood than individual influences. Of the available evidence, Lucas (1995) found that negative stereotypes of 'older workers' were more prevalent among employers in smaller organisations than in larger organisations within the hospitality industry. She attributed this finding to less sophisticated employment policies, and more specifically, less sophisticated equality policies, in smaller firms (Lucas 1995). Her study illustrates three important points. First, although Chiu et al. (2001) found no significant relationship between firm size and attitudes towards 'older workers', Lucas' (1995) research indicates that the size of an organisation may be influential in explaining attitudes towards 'older workers'. Second, there is a possibility of an industry effect on attitudes towards 'older workers'. Both Chiu et al. (2001) and DeMicco (1989) argue that employers in service-type industries may have more negative attitudes towards 'older workers' than other industries. They reason that industries dominated by frequent role contact with customers, particularly a younger demographic of customers, often favour younger over older employees. Adler and Hilber (2009) recently asserted that 'older workers' are under-represented in service sectors, adding some support to Chiu et al.'s (2001) and DeMicco's (1989) views. Finally, Lucas (1995) proposes that the presence of an equality policy in an organisation may influence attitudes towards 'older workers'. Chiu et al. (2001: 636) argue that such policies are likely to 'cultivate a more tolerant atmosphere toward older workers in the organisation by raising awareness and countering stereotypical beliefs'. They found that the presence of an equality policy in an organisation resulted in more favourable attitudes towards 'older workers' (Chiu et al. 2001).

There is also some evidence to suggest that the age demographics of an organisation have an influence on attitudes towards 'older workers'. Relational Demography (Tsui et al. 1995) posits that the demographic composition

of an organisation or workgroup influences individuals' attitudes at work. Here, it is suggested that similarity to referent others in an organisation results in favourable outcomes, much like Social Identity Theory (Tajfel and Turner 1979; Ashforth and Mael 1989), because it is based around the similarity–attraction paradigm (Byrne 1971; Riordan and Shore 1997). Individuals who are similar to one another are more likely to treat each other in a favourable manner, while dissimilarity can lead to negative treatment. This could be linked with McCain, O'Reilly and Pfeffer's (1983) earlier research to indicate that being 'older' in a work group dominated by younger people results in a greater tendency for the 'older workers' to leave the organisation.

Relational Demography also suggests that the frequency of interactions with groups in the organisation can influence attitudes towards these groups (Tsui et al. 1995). For example, both Hassell and Perrewe (1995) and Chiu et al. (2001) found some evidence to suggest that frequency of interaction with 'older workers' has the potential to reduce negative stereotypes. This appears to be related to Butler's (1969) and Falkenberg's (1990) argument that greater interaction with social groups reduces the likelihood in the formation of bias. Remery et al. (2003), however, found that organisations with more 'older workers' actually had more negative beliefs about them, which as Finkelstein and Farrell (2007) state, remains without explanation.

Within the broader attitudinal literature, research on the formation of attitudes has received relatively little attention. Eagly and Chaiken (1993: 681) state that this 'lack of attention to the development issue of how attitudes are formed and become strong... (is a) serious omission and limitation' of the literature. More recently, however, Kite and Wagner (2004) have suggested that Social Role Theory (Eagly 1987, 1997) might be potentially useful in explaining the development of attitudes towards 'older workers'. Social Role Theory proposes that viewing people in various social roles provides an important basis for attitudes and beliefs about social groups (Eagly 1987, 1997; Eagly et al. 2000).

Social Role Theory (Eagly 1987, 1997) proposes that our attitudes about social groups can be derived from observing, and interacting with, people in various social roles. From these interactions with group members and observations about their behaviour, we develop expectations about how all members of these groups behave. As Kite et al. (2005: 243) explain, 'because we observe the role-driven behaviour, which may or may not reflect the real attributes of the person being observed, perceivers come to associate characteristics of these roles with the individuals who occupy them'.

Arguably, one important social role in an organisation is the role of an 'older' worker. As we have already seen from the discussions earlier in

this chapter, the ways in which others ‘categorise’ workers as ‘older workers’ is considered especially important in determining their attitudes and behaviours towards ‘older workers’ (Sterns and Doverspike 1989; Cleveland and Shore 1992; Pitt-Catsouphes et al. 2010). This fits with the Role Theory perspective. In the search for explanations that account for individual differences in attitudes towards ‘older workers’, (or indeed, ‘younger’ workers), Role Theory may offer greater explanatory power than previous stereotype accounts (cf. Rosen and Jerdee 1977; Posthuma and Campion 2009) because Role Theory outlines how we come to derive these stereotypes in the first place; stereotypes about groups are formed from our observations and expectations of group behaviour. Role Theory, essentially, takes a step back, offering a wider lens from which to view individual differences in attitudes towards ‘older workers’ than Social Identity Theory (Tajfel and Turner 1979) and Relational Demography (Tsui et al. 1995) outlined earlier. Role Theory posits that individual differences in attitudes are less about similarity–attraction to a group, and more about how different individuals’ view the role of an ‘older worker’ that lead to their individual attitudes towards ‘older workers’.

Discussion and Future Directions

Our intention in this chapter was to provide a comprehensive review of the literature in order to advance an understanding of ageist attitudes in the workplace. Ageist attitudes can have potentially serious consequences for older workers, as they may serve to offer limited opportunities to people who are perceived as ‘older’ at work. Particularly, negative attitudes may ‘affect the judgements and actions of organisational decision makers’ (Hedge et al. 2006: 46). Understanding the nature of ageist attitudes is therefore hugely important at a time when the workforce is not only rapidly ageing but also becoming increasingly age-diverse. Despite recent and burgeoning research, there is a lack of systematic empirical evidence of the age-related attitudes that exist not only towards ‘older’ workers but also towards ‘younger’ or ‘mid-life’ workers. Poor operationalisation of the tripartite structure of ageist attitudes across research studies is evident, as are theoretical advancements on how age-related attitudes are created and maintained within organisations. As such, and based on our discussion throughout this chapter, we have four critical, and specific, directions for future research in this area: (1) Researchers, practitioners and policymakers concerned with ageist attitudes at work need to begin to focus on how ageist attitudes affect not only those perceived to be ‘older’ but

also those perceived to be 'younger' or 'middle-aged' at work; (2) Further, those involved in examining ageist attitudes in the workplace need to not only account for the role that age stereotypes have to play in workplace decision making but also that of emotion (affect) and behavioural predispositions as they relate to age; (3) We call for the development of valid and reliable measures of cognitive, affective and behavioural age-related attitudes for use in the decision-making context at work; and (4) We advocate for future work in this area to be underpinned by sound theoretical foundations, which aim to advance our theoretical knowledge about how ageist attitudes are actually formed in organisations. It is only when we unearth a real, comprehensive understanding about how ageist attitudes are formed, and what forms these attitudes take within organisations, that we can begin to advance real solutions and interventions to reduce the incidence of ageist attitudes within the workplace.

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17

Millennials, Media, and Research: Ageism and the Younger Worker

Joel T. Nadler, Rosey Morr, and Samantha Naumann

Millennials, Media, and Research: Ageism and the Younger Worker

Traditionally, employment concerns of ageism in the USA have focused on individuals over the age of 40. Indeed, the most common research on ageism, considered in this chapter as discriminatory acts targeting specific age groups (Palmore 1999), examines topics like the protection of older workers (Rothenberg and Gardner 2011), whether discrimination of older workers is intentional or unintentional, subsequent effects on employee attitudes (James et al. 2013), and the relationship between discrimination of older workers and intended retirement age (Bayl-Smith and Griffin 2014). Furthermore, US legislation focuses its protection against age discrimination solely on individuals over the age of 40, as is evident from the Age Discrimination in Employment Act (ADEA) of 1967. Despite the parameters of the ADEA, ageism is not limited to those who are 40 and older.

In the workplace, young workers are also at risk of encountering discriminatory acts because of their age (North and Fiske 2012). In fact, Duncan and Loretto (2004) found that young workers reported experiencing the second-highest amount of age discrimination after older workers. Younger workers

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reported discrimination in different forms, such as lower pay and benefits, encountering evidence of negative attitudes towards intelligence, ability, skills, and characteristics, and being refused a promotion (Duncan and Loretto 2004). Workers from older generations might also question the commitment and dedication of younger workers, hesitating to give them credibility and respect (Myers and Sadaghiani 2010).

A recent article from *The Huffington Post* described a survey in which hiring managers explicitly reported being three times more likely to hire someone over the age of 50 than someone under the age of 30 (Age discrimination 2012). These survey results suggest that ageism is not limited to older workers. The present chapter provides insight into ageism towards younger people (Millennials) in the USA by exploring current ageism laws both in the USA and around the world, discussing stereotypes and ways to change them, outlining stereotypes concerning Millennials, describing generational research on Millennials and Generation Z, and highlighting issues concerning ageism laws in the USA.

Ageism and the Law in the USA

As evidenced by these empirical studies, young workers do indeed experience age discrimination. Despite this fact, US legislation does not explicitly protect young workers from such ageism. In this regard, US federal laws appear to have plenty of catching up to do to mirror both the public perceptions of generational groups and the empirical research available. This section will discuss the current US federal and state laws surrounding ageism in the workplace, noting the lack of federal legislative protection for young workers against age discrimination.

Federal Laws

The US government has passed several laws aiming to prohibit ageism in the workplace. The ADEA of 1967 was enacted by President Lyndon B. Johnson to protect applicants and employees who are over the age of 40 from being targets of discrimination in the workplace (Dennis and Thomas 2007). It encompasses a wide range of employment areas such as compensation, selection, promotion, and conditions of employment such as limiting, segregating, or classifying individuals that may result in a restriction or reduction of access to workplace opportunities (Rothenberg and Gardner 2011). The ADEA is enforced by the Equal Employment Opportunity Commission (EEOC),

which is charged with investigating age discrimination claims and assisting in resolving these claims when appropriate. The EEOC does not conciliate cases, but does pursue litigations against employers, governments, and labour unions (Occhialino and Vail 2005).

Within the USA, there is also the Older Workers Benefit Protection Act (OWBPA), which amended some of the enforcement and implementation issues that had occurred since the enactment of ADEA. Enacted in 1990, the OWBPA clarified the protections given to older people concerning benefits plans and other issues (Harper 1993). For example, the OWBPA clarified that employers are limited in their ability to exchange an expanded retirement package in return for an older employee signing a waiver to not pursue wrongful termination under the ADEA (Harper 1993).

Even though the ADEA proposes equality on the basis of age, Powell (2010) contends that it is inadequate in comparison to other laws enacted to provide social justice and equality. Powell argues that the ADEA introduces ageism as a human rights issue such as racism and sexism, yet does not provide for emotional distress or punitive damages (2010). Rothenberg and Gardner (2011) argued that the ADEA was enacted more to improve productivity (reducing bias in decision-making) in the workplace instead of focusing on eliminating ageism (increasing equitable treatment of different demographic groups). Aside from Powell (2010) and Rothenberg and Gardner's (2011) arguments, the US EEOC (n.d.) points out one main potential issue with the ADEA. The EEOC (n.d.) argues that the ADEA only forbids age discrimination against people who are age 40 and older. It does not protect workers under the age of 40, although some US states have passed laws that protect younger workers from age discrimination (EEOC, n.d.: Age Discrimination, para. 2).

State Laws

In addition to federal laws, there are also US state laws that aim to suppress ageism in the workplace; however, these laws vary from state to state inconsistently. Some state laws include younger workers as a protected class in addition to older workers (over 40 years of age). For instance, Florida's Civil Rights Act does not define age parameters for a discriminatory act to be classified as ageism (Florida Legislature 2014). In contrast, Georgia does not have any age discrimination laws at all (Workplace Fairness 2006). Woodruff (1998) argues that the various state laws have been successful in covering all age groups and can serve as a template for amending the ADEA to also cover all age groups. However, the same discrepancies in the ADEA are present today.

The federal law has been argued to be inadequate in fighting ageism in the workplace. Furthermore, state laws are inconsistent and may not even cover ageism in the workplace. Based on the current literature, state and US federal regulatory agencies need to expand current protections to ensure that younger workers are also protected against ageism in the workplace.

Ageism Laws Around the World

The preceding section described laws concerning ageism within the USA. However, there is not one set of laws that is agreed upon worldwide. As a result, ageism laws vary around the world. Lewis Silkin Law ([2014](#)) outlines some of these differences in ageism laws according to different world regions.

One difference between ageism laws in the USA and ageism laws in Europe is that ageism laws in Europe tend to cover all employees, regardless of age and the number of employees in a given organisation (Dowling [2013](#); Lus Laboris [2010](#)). In France, for example, age discrimination laws cover all employees bound by an employment contract with no minimum or maximum age parameters specified. Germany also does not have any specified age parameters, stating that all age levels receive the same levels of protection. Ireland was the first of the European Union Member States to enact a law pertaining to ageism. Their law protects older workers as well as younger workers. However, individuals who are below 18 years of age are not covered, as employers reserve the right to set a minimum age qualification for employment.

There are also differences in ageism laws in the Asia Pacific region in comparison to the USA and Europe (Age Discrimination Information, n.d.). For example, Australian law constitutes vicarious discrimination as a form of discrimination towards an employer. For example, if an employee displays a form of discrimination, that employee's organisation is vicariously liable for the employee's conduct under Australia's Age Discrimination Act of 2004 (Age Discrimination Information, n.d.). Another difference in the Asia Pacific region's laws is that not all areas have ageism laws. Hong Kong and India, for instance, do not have any law concerning ageism.

Stereotypes

Though there are laws concerning ageism in the USA, there is no standardised litigation protecting younger workers in the USA. However, research suggests that there are stereotypes that may lead to discrimination towards younger

workers. This section introduces stereotypes concerning age and explains how age stereotypes can perpetuate into discrimination in the workplace.

Stereotypes are beliefs that are held by people about others based on their group memberships, are often widely shared within a culture (Wood and Wood 2002), and are transmitted through that culture's media (Carrigan and Szmigin 1999). Stereotypes are social attributes, such as race, gender, age, and religion, which allow the use of these categories to be used as shortcuts to make sense of the world based on past experiences (Brehm and Kassin 1996). Though stereotypes are used to make sense of the world, they can also have a negative impact when one's social groups are associated with negative traits. For example, stereotypes are often associated with negative attributions, which can result in prejudice, a negative attitude, and discriminatory, negative behaviours (Crandall et al. 2011; Nadler and Stockdale 2012).

Fiske (1993) suggests there are two types of stereotypes that may lead to discrimination: prescriptive and descriptive stereotypes. Descriptive stereotypes relate to descriptive traits associated with a group. For instance, Vinkenburg et al. (2011) suggested a common US age-based descriptive stereotype is that "all young people are obsessed with their mobile devices." This is a stereotype because it is based on culturally supported beliefs rather than empirical data. There are exceptions to this belief; however, it is socially constructed through media representations and through individuals' experiences with younger people. Prescriptive stereotypes do not describe an individual directly. Instead, they delineate how a person of a particular group should or ought to be or act based on their social group status (Eagly and Karau 2002). One common example of a prescriptive stereotype is that "older people shouldn't spend time keeping up with the latest technologies" (North and Fiske 2012). This is a prescriptive stereotype because it is a belief that indicates how older people *should* or *should not* be. Eagly and Karau's (2002) role congruity theory builds on prescriptive stereotypes and predicts that we are more likely to discriminate against individuals that violate prescriptive stereotypes.

Age Stereotypes

There are many stereotypes based on age groups that may result in prejudice or discrimination. The most known stereotypes concerning age target older populations, which are transmitted in media through movies, television, and news. Additionally, advertising communicates age-based stereotypes through many age-defying products, which suggest that youthfulness is a positive trait and displaying aging should be avoided (Carrigan and Szmigin 1999).

Older individuals are stereotyped as lacking or having declining agility, cognition, and health (Cuddy et al. 2005). Additionally, older individuals are seen as being unable to acquire new knowledge, skills, and abilities and are also seen as resistant to change and new technologies (Carrigan and Szmigin 1999). A recent study found that negative messages such as infantilising commentary and discussions banning the elderly from various public activities are also projected through social media sites such as Facebook (Levy et al. 2013). These negative messages concerning the elderly did not significantly differ by gender according to Levy et al. (2013). When negative stereotypes exist, there is always a danger that these stereotypes can result in biased hiring and promotion decisions in the workplace, since attitudes often lead to behaviours (Gordon and Arvey 2006; Nadler and Stockdale 2012). For example, individuals who are over the age of 40 have been perceived as having poor performance, shorter tenure, and are seen as costly to insure (Posthuma and Campion 2008), adding more negativity to the perceptions of this age group. In contrast to these stereotypes, Ng and Feldman (2013) tested whether or not older workers are psychologically and physically weaker than their younger counterparts, only to find that these beliefs were not supported.

Individuals who are over the age of 40 are also associated with some positive attributes compared to younger workers. For example, Posthuma and Campion (2008) found that older workers are seen as more knowledgeable, experienced, and loyal to their organisations. Furthermore, Dennis and Thomas (2007) found that older individuals are valued for their perceived ability to keep calm during crises as compared to younger workers.

Stereotypes are not limited to any one age category or generation. Levickaitė (2010) suggested that younger workers can be stereotyped as disloyal to organisations by wanting to acquire new job skills and then abandoning the organisation that trained them for a better job. However, empirical research has found few differences between the generations on intentions to leave and organisational loyalty (Cennamo and Gardner 2008). Morr and Nadler (2014) did find that the stereotypes of Millennials were incongruent with the characteristics of successful workers and that both Millennials and Generation X individuals indicated an unconscious bias favouring the matching of Generation X'ers with competence on an implicit association test and Millennials with incompetence in workplace roles. However, some stereotypes targeting Millennials are positive (Boduroglu et al. 2006). For instance, they are perceived to be quick to adapt to new concepts and technologies as well as willing to acquire new skills through training sessions and by interacting with those who are established in organisations (Levickaitė 2010).

Ageism tends to stem from overgeneralised generational stereotypes, which are culturally transmitted for each age group including the young and the old (Dennis and Thomas 2007). Stereotypes can be activated by characteristics of the person being categorised, including easily determined master status stereotypes such as race, gender, and age (Hilton and Hippel 1996). Age is one of these immediately available characteristics to outside observers, though ageism is more socially condoned compared to racism or sexism (Clarke and Griffin 2008). Additionally, everyone is subject to various forms of ageism during their lifetime since aging is a universal human process that cannot be avoided. Regardless of race, gender, ethnicity, or religious affiliation of an individual, the potential for experiencing age discrimination persists.

Age and generational stereotypes are perhaps less offensive and more socially acceptable because they are so collectively focused in our culture and media. Popular media commonly portrays younger workers, “Gen Ys” or “Millennials,” as requiring unique treatment in the workplace, particularly when it comes to management and recruitment. One article from *Bloomberg Businessweek* highlighted the importance for managers to be trained in keeping Millennials happy at work (Weinberg 2014). Another described how to successfully recruit and retain Millennials (Cheese 2008). Many leaders feel as though they need to somehow manage Millennials differently, which is possibly due to the onslaught of articles portraying Millennials as needing a different managerial style and work environment than their predecessors. Clearly, the stereotypes of this younger generation are permeating managerial and organisational perceptions of young workers and affecting how they are treated in the workplace.

Changing Stereotypes

Research indicates that age-based bias can be minimised (Falkenberg 1990). For instance, Rosenthal and Crisp (2006) found that blurring the boundaries between in-groups and out-groups can result in smaller amounts of bias based on group memberships. Furthermore, Powell (2010) argues that having a concise definition of ageism, in addition to active interventions, is necessary to successfully counteract the negative outcomes associated with negative age-based stereotypes.

Tam et al. (2006) found evidence that stereotypes can be changed on an individual level by pairing up younger individuals with elders. Specifically, when younger individuals spent more quality time with older individuals, they perceived their elders in more positive ways. Tam et al. also found that

younger individuals reported feeling more empathetic towards the older individuals with whom they spent time compared to previously held negative age-based stereotypes. Becoming more familiar with the unknown makes people more comfortable and less likely to view others through the lens of stereotypes/stereotypical behaviour.

Falkenberg's (1990) justification–suppression model of stereotypes suggested that people have a tendency to change their perceived stereotypes towards a group when members of that group act in ways that contradict the group's stereotypes. The literature suggests that when people are faced with a target of their prejudice, they either justify their reasons for their prejudice, which leads to discrimination, or they suppress their prejudice, which reduces their motivation to act on the prejudice (Crandall and Eshleman 2003). The motivators for suppressing prejudice include empathy feelings and personal values (Shapiro and Neuberg 2008). When the suppression route is taken, people's prejudices towards the target are reduced, thus combating the prejudice (Crandall and Eshleman 2003).

King and Ahmad (2010) found support for the justification–suppression model. In their study, they found that Muslim job candidates were treated more warmly and were more likely to receive a job offer when they provided positive information contradicting potentially negative stereotypes in comparison to not providing stereotype-contradicting information. Overall, Muslim women who did not present stereotype-inconsistent information were treated the most negatively. When the stereotypes of Muslims were not refuted, the stereotype became active and biased the ratings of the person under evaluation. However, if the Muslim individual presented incongruent, individuating information, it acted to suppress the stereotypes, resulting in less biased appraisals.

Studies such as the ones listed above examine how stereotypes affecting people based on race and gender have been extensively studied and are the basis for many of our theories of how stereotypes can influence hiring decisions (Dovidio and Gaertner 2000; Eagly and Karau 2002; Falkenberg 1990). However, workplace age discrimination is much less common in top-tier social psychology and industrial/organisational psychology journals, and is almost non-existent when not focused on older protected groups (Nadler et al. 2013; Ruggs et al. 2013).

Even though research has presented evidence supporting the idea of minimizing some negative effects of stereotyping, more research is required to fully understand not just ageism in the workplace but also ageism targeting younger workers. For instance, younger workers are often perceived as entitled (Ng et al. 2010), and the stereotypes activated when thinking about

younger employees were found to be incongruent with the stereotypes of successful workers (Morr and Nadler 2014).

Generational Research

Most generational studies are descriptive in nature, measuring and comparing attitudes between generational groups or analysing media representations of different generations (Macky et al. 2008; Sheahan 2006; Twenge et al. 2010). Such studies are useful measures of the stereotypes and beliefs associated with each generation, but they rarely assess whether these attitudes are reflective of actual differences. There are currently multiple generations occupying the workforce today: Baby Boomers, Generation X, Millennials, and Generation Z (see Table 17.1). Each of these generational cohorts have their own characteristics that shape their perspectives of their jobs and lives and are based on events that have occurred in their lifetime, such as the assassination of a president, the launching of a rocket to the moon, or the end of a significant war (Carver and Candela 2008; Twenge et al. 2010). Oftentimes, these differences are exaggerated, resulting in the endorsement of stereotypes for members of generations. These stereotypes will be explored further in this section of the chapter.

Generation Z

The birth year parameters for Generation Z members are considered to be the mid-to-late 1990s to the present day, mid-2010s (Igel and Urquhart 2012). Thus, there is currently an overlap between the Millennial generation and Generation Z due to a lack of consensus on the year parameters. Generation Z is just beginning to emerge in the workforce as they will soon become of working age. They have already been labelled as being more adaptable and technologically aware than their predecessors and have been dubbed the “instant on-lining” generation, the “dot-com” generation, and the “digital” generation because of their natural ability to understand novel technologies (Levickaite 2010).

Table 17.1 Common generational labels and age ranges

Generation	Baby Boomers	Generation X	Millennials (Gen. Y)	Generation Z
Birth Years	1943–1960	1961–1981	1980s–early 2000s	1990s–2000s
Current Age	54–71	33–53	15–early 30s	15–early 20s

In the workplace, they are expected to be valued for their adaptability and willingness to learn new skills and abilities. Levickaitė (2010) suggests that they will learn by observing examples of those who are already succeeding in the workforce and will be highly adaptable to new technologies and the shifting privacy standards of social media and online work. Additionally, as younger individuals emerge in the workforce for the first time, they may encounter intergenerational conflicts that require further research to fully understand.

Even though there seems to be a lot of information regarding the characteristics of different generations, fully leveraging generational differences as strengths in the workplace has not yet been greatly researched. Studies that have examined generational differences have generally found inconsistent workplace characteristics concerning generational differences, including Millennials (Montana and Lenaghan 1999; Twenge 2010; Twenge et al. 2010).

Each generation is characterised by certain values, life experiences, attitudes, behaviours, and life circumstances that distinguish them from one another. Furthermore, it is these characteristics that catalyse widely held beliefs and stereotypes about individuals based on their age. These beliefs, or age-related stereotypes, have the power to alter intergenerational relations and connections. Thus, with a growing amount of research indicating the importance of intergenerational cooperation and reduction of conflicts, it is beneficial to analyse how individuals might be stereotyped based on their age. This is especially important for Millennials, who are entering the workforce and encountering these intergenerational issues for the first time.

Millennials/Generation Y

Who are the “Millennials”? The definition tends to vary. The birth years that mark the parameters of this generation are not as precise as the other generations, and different theorists place the start and end of this generation’s birth years at different dates. Additionally, there is no consistent label for this generation with terms such as Millennials, Generation Y, Echo Boomers, Generation Next, Generation Why, and Generation Me (Macky et al. 2008). For the purposes of this chapter, we have mainly used the term “Millennials.” Birth years of Millennials begin somewhere in the early 1980s and end in the early 2000s, depending on different sources (Howe and Strauss 2000; Levenson 2010; Myers and Sadaghiani 2010). Currently, roughly ranging in age from 12 to 35 years old, Millennials represent the youngest employees, and some have yet to enter the workforce.

Members of the Millennial generation have been shaped by helicopter parents, frequent positive feedback, economic turmoil, and vast technological advances including telecommunication and the internet (Thompson and Gregory 2012). They are distinguished from other generations by two factors (Hershatter and Epstein 2010). The first is their ability to pick up on technology as if it were a “sixth sense.” The second is their perception that employers should adhere to their needs, leading to a perception that they are the “entitled generation” (Clement 2008; Twenge et al. 2010).

Millennials are the largest generation in history thus far, an estimated 76–96 million strong (Cox 2008; Howe and Strauss 2000; Solomon 2014)¹. In addition, Millennials are more diverse than preceding generations (Cox 2008; Howe and Strauss 2000). A US study by the Pew Research Center in 2010 found that the Millennial generation consists of a higher percentage of Blacks and Hispanics/Latinos and a lower percentage of Whites than previous generations. Aside from being more demographically diverse, Millennials are considered to be more accepting of and comfortable around diversity and individual differences than previous generations (Myers and Sadaghiani 2010). Millennials are also more highly educated than other generations at comparable ages. Specifically, more than half of the Millennials in the USA have attended college, making them the first generation to hit the 50 per cent mark (Pew Research Center 2010).

A growing body of research has focused on the recruitment and retention of Millennials in the workforce (Hershatter and Epstein 2010; Ng et al. 2010; Yang and Guy 2006). This increase in interest stems from the stereotypes that Millennials are disloyal, difficult to manage, needy, and entitled (Thompson and Gregory 2012). Thompson and Gregory note that the perceived disloyalty of Millennials has been attributed in media sources to the economic issues experienced in the USA during the 2000s. Because Millennials tend to have unfavourable feelings regarding the health of the job market, stemming from perceptions of layoff, unemployment and high turnover some have encountered while trying to begin their careers, they believe that if they are disloyal, it is justified (Thompson and Gregory 2012).

Popular Opinion and Millennials

Age stereotypes can be positive or negative in nature and can affect all generations in different ways. These stereotypes colour the way individuals are perceived as workers and, unfortunately, can lead to discrimination

¹ Dependent on what range of birth years Millennials are considered to cover.

(Morr and Nadler 2014; Twenge et al. 2010). This section will expand upon the stereotypes based on age by more thoroughly discussing how these commonly held stereotypes are expressed in the form of popular opinion and discussion in the media.

One way or another, Millennials have been ascribed a reputation that is widely embraced in popular opinion and media. A Pew Research Center Report in 2010 described this generation as “confident, self-expressive, liberal, upbeat and open to change” (p. 8). They are also described as having “look-at-me tendencies,” referring to Millennials’ high usage of social networking sites (Pew Research Center 2010: 8). Although there are a few generational characteristics that seem positive in nature (confident and upbeat), most workplace stereotypes of Millennials held by popular opinion and kindled by the media have negative connotations.

One of the most frequently referenced stereotypes is that Millennials are lazy and lack ambition. An opinion piece published in *The Boston Globe* bashes Millennials, using terms and phrases such as “idle,” “content,” “nesting,” and “victims of their parents’ success” (Graham 2013). The piece claims that Millennials do not actively search for jobs, do not strive to move out on their own, or work hard with ambition because they are accustomed to and satisfied with the lifestyle that has been made available to them by their parents. According to Graham (2013), Millennials do not wish to downsize from beautiful kitchens with granite countertops, four-car garages, and walk-in closets the size of a small bedroom to small apartment living. Furthermore, Millennials are supposedly content taking advantage of their parents’ health insurance, which covers them until age 26. Beyond this claim of reluctance to move out, opinion pieces in the media also assert that Millennials care more about finding personal meaning in their work and would rather have no job than a job they dislike (Galer 2014; Graham 2013).

Similarly, popular opinion as seen in the media often depicts the Millennial generation as entitled. For instance, Millennials are said to make higher demands and be pickier about their work than co-workers from previous generations (Levenson 2009). A textbook on managing stress even mentions that “sociologists have observed that the Western lifestyle has become a little too comfortable for the ‘Millennials.’ In this age of abundance, the ‘Entitlement Generation’ has arrived for whom expectations are high and unmet expectations generate a well-spring of unbridled stress emotions” (Seaward 2012: 125). Applied to the workplace, Millennials are described as having high expectations, perhaps even impatient, for rapid career growth and quick promotions (Cheese 2008; Myers and Sadaghiani 2010; Weinberg 2014). In contrast,

older co-workers expect these younger workers to “pay their dues” and “wait their turn for promotions” (Myers and Sadaghiani 2010: 227).

Another commonly held belief regarding Millennials is that they are more likely to job-hop compared to previous generations, portraying them as disloyal and selfish. Meister (2012) reported that as many as 91 per cent of Millennials expect to leave their job within three years. Perhaps this is perceived as a derivative of unmet expectations, a lack of career growth potential, or some other dissatisfaction with their jobs or organisations. Perhaps it is due to Millennials’ optimistic outlook and hope that the next organisation will provide them with the career they desire or more meaning in their work. Perhaps it is even due to boredom, as Myers and Sadaghiani (2010) suggest. Regardless of the believed cause, an article in *Forbes* mentions Millennials’ high likelihood to leave an organisation in the short term as a common myth, stating that in actuality, Millennials and non-Millennials are equally likely to leave their organisations within the next six months (Galer 2014). This lack of differences in the actual likelihood of job-hopping between generations has also been found in larger survey studies (Cennamo and Gardner 2008).

Given the rapid technological advancements in today’s world and widespread popularity of cell phones, tablets, and other handheld devices, it is no surprise that Millennials use them often and with finesse. After all, Millennials grew up during the dawn of these technological introductions and adoptions. According to the Pew Research Center (2014), 83 per cent of Millennials own a smartphone, compared to 74 per cent of Generation X and 49 per cent of Baby Boomers. Additionally, Maynard (2014) reported that 40 per cent of Millennials would rather lose their car than their smartphone. However, popular opinion and media assert that this focus on mobile communication actually hinders Millennials’ communication skills. It is quite common to hear that Millennials are too attached to their cell phones and social media such as Facebook, Twitter, and Instagram (Fowlkes 2012). It is also common for people to wonder how this “attachment” to handheld devices and social media will affect the written and oral communication skills of the younger generations such as Millennials (Hansen 2013).

Seaward (2012) describes how young people today often send text messages and emails while in the company of the person they are messaging (Seaward 2012). In addition, the textbook states that people under the age of 30 may have “deplorable” interpersonal communication skills due to the preference for online or cell phone communication and companies are taking note of this supposed phenomenon in interviewing younger workers and on-the-job miscommunications (Seaward 2012, p. 310). That “Millennials would rather talk to a screen than a person” is a stereotype directly addressed in a

Forbes article entitled, “Millennials vs. Boomers: 5 Stereotypes That Aren’t True (Mostly)” (Havig 2013). In this article, the stereotype of Millennials preferring screen-to-screen communication over face-to-face is supported by the author. Havig (2013) suggests that it is beneficial for companies to use multiple communication mediums at work, such as text messaging, phone calling, emailing, instant messaging, social media, and face-to-face as appropriate with Millennial employees.

Additionally, according to popular opinion and media, it can be hard to communicate with Millennials. An article in *Bloomberg Businessweek* claims that managers should be direct with Millennials, treating them differently than other generations when offering them feedback, as Millennials will ignore any negative criticisms and only attend to positive feedback (Weinberg 2014). This perception that Millennials only pay attention to positive feedback dovetails with the notion that they are overly confident and self-absorbed. Nonetheless, others believe that Millennials desire frequent or continuous feedback from supervisors and expect to have an open-communication relationship with them (Myers and Sadaghiani 2010).

Millennials are also perceived to value blending work with play, placing a high priority on their personal lives, and seeking more work-life balance compared to previous generations (Cheese 2008; Galer 2014; Myers and Sadaghiani 2010; Weinberg 2014). Media articles published in *Bloomberg Businessweek* encourage managers in organisations to consider Millennials’ greater demands for work-life balance compared to previous generations in order to attract, retain, and develop these younger workers (Cheese 2008; Weinberg 2014). Millennials are said to consider their work less important to their personal identities (Myers and Sadaghiani 2010). Furthermore, popular opinion and media suggest that organisations should be prepared for Millennials to seek out flexible work schedules, such as the ability to work remotely or shift work hours in the day. With this in mind, older co-workers may tend to view Millennials as less dedicated to the organisation, perhaps even lazy, which then makes it harder for Millennials to gain respect and credibility in their jobs (Myers and Sadaghiani 2010). Despite these commonly held beliefs, a *Forbes* article by Galer (2014) described the notion that Millennials desire work-life balance more than previous generations as a myth debunked by recent Oxford Economics research. Galer (2014) stated that 31 per cent of non-Millennials reported work-life balance as being important, compared to 29 per cent of Millennials. This would seem logical as Millennials are less likely to have spouses and children at this point in their lives and therefore are able to devote more time to building a career.

Even though many commonly held stereotypes about the Millennial generation seem negative or critical, Howe and Strauss (2000) enthusiastically portrayed Millennials in a positive light. They described Millennials as diverse, team-oriented, technologically savvy optimists and hopefults who are respectful of rules. Furthermore, they characterised Millennials as sheltered in childhood, confident, and achievement-oriented, yet pressured to gain higher education and make something of themselves. Accompanying this pressure from parents and society to achieve, Millennials were recognised as committing less violent crimes and suicide, having less unprotected sex, experiencing less alcohol-related problems, and using less illicit drugs than the previous generation (Howe and Strauss 2000).

Ageism Towards Millennials in the Workplace

We know that workers, regardless of generation, can potentially experience some form of age discrimination based on stereotypes similar to those previously discussed. We also know that the discrimination of older workers is more commonly researched compared to other age groups (Nadler et al. 2013), and that older workers are protected against discrimination by state and federal laws in the USA (Macky et al. 2008). However, one might wonder whether younger workers have been empirically shown to experience age discrimination. If popular opinion associates Millennials with the negative stereotypes discussed, it would seem likely that Millennials would then experience some sort of discrimination based on their age, whether it falls under the realm of organisational selection, promotion, training, or some other form of personnel decision-making. In fact, although it is extremely under-researched (Nadler et al. 2013; Ruggs et al. 2013), a few empirical studies have reported impacts of ageism on Millennial workers.

Duncan and Loretto (2004) note that the term ageism is now increasingly used to refer to age discrimination at any age, and a growing body of data shows that younger employees are also affected by age discrimination (Age Concern 1998; Department for Education and Employment 2001; Loretto et al. 2000). However, beyond knowing that age-based bias can affect all age groups, little is known about how ageism affects different age categories of employees. The lack of empirical investigation may be impacting the effectiveness of current legislation and interventions. Additionally, how ageism may interact with other stereotypes such as race and gender has been noted by some researchers (Duncan and Loretto 2004) but needs further empirical evaluation.

To further examine ageism across age categories, Duncan and Loretto (2004) distributed questionnaires to 2000 randomly selected employees of a 9000-staff major UK financial service firm. In the UK, both direct and indirect discrimination is prohibited by legislation covering all age groups, not just older workers. Their response rate was 56 per cent, and the sample was representative of the company's employees. Results showed that 200 respondents reported receiving unfavourable treatment due to their age. These responses were then categorised as negative treatment because of being of a younger age (under age 40) and negative treatment because of older age (over age 40). Some concerns of those discriminated against due to their younger age included starting salary and raises based on age rather than experience or qualifications, others assuming they were less capable, less intelligent, or less trustworthy with challenging assignments, being considered less responsible than older co-workers, being refused a promotion due to young age, and being given less credence due to youthful appearance.

Duncan and Loretto (2004) also found that both men and women of younger ages reported being discriminated against due to their age. Overall, their findings indicated that older employees over age 45 and younger employees under age 25 were most prone to negative age discrimination. Additionally, although experiencing age-based discrimination was similar for younger men and women, it tended to be more extreme and more impactful for women. Furthermore, employees aged 16–29 experienced unfavourable treatment due to age not only in the form of pay, benefits, and promotions but also in the form of negative behaviour towards them. Duncan and Loretto (2004) concluded that discrimination and bias can affect all age ranges, thus endangering organisations through decreased efficiency in hiring and promotion and increasing the possibility for legal actions targeting the organisation.

Twenge and Campbell (2008) examined existing archival studies using US student samples to gather measures of psychological traits from multiple generations. In this way, they were able to compare each generation's overall tendencies, controlling for age. For example, Baby Boomer data was gathered from studies that measured Baby Boomers when they were college-aged, which was then compared to data of Millennials gathered at the same age. Comparing Millennials to past generations, Millennials as a group had higher narcissism, self-esteem, and anxiety as well as a lower need for social approval and a stronger external locus of control. Drawing from this review of past measures of personality traits, the authors suggest Millennials are more stressed (anxiety), less worried about what others think (low need for social approval), and less likely to take personal responsibility (higher external locus of control).

More recently, Kellner et al. (2011) examined the types of dismissals experienced by young people and the patterns of circumstances leading to these dismissals in Australia. Young people in Australia are especially susceptible to workplace exploitation and experience unpaid overtime, lack of supervision, and age-based discrimination (ACTU 2003a; Mourell and Allan 2005; Watson 2005; Young Workers Advisory Service, 2005), and young workers are facing declining pay and working conditions as well as greater precariousness of employment (ACTU 2003b; Fair Employment Advocate 2008; McDonald and Dear 2005; Office of Industrial Relations 2005a). However, there is a definite lack of research on the relationship between young workers and employers. Kellner et al.'s study used data made available by the Young Workers Advisory Service, an Australian government-supported service that assists young people under the age of 24 in work-related issues. Data consisted of 1259 reported cases (64 per cent female, 36 per cent male) involving workplace dismissal of workers aged 15–24 from 2002 to 2005.

Kellner et al. (2011) identified that one category of circumstances leading to dismissals was alleged age discrimination (e.g., dismissal occurred right after a birthday that would require a higher pay rate). Furthermore, 8 per cent of the 120 alleged discrimination cases were specified as age discrimination. When age discrimination occurred, employees were said to be too young or too old for the position. Kellner et al. (2011) noted the inadequate protections for young workers in the realm of the workplace and the importance of legislation to ensure young people fairness and safety in the workplace.

Finally, North and Fiske (2012) provided insight on the state of research regarding ageism. They examined the literature on ageism, concluding that it is less often researched and more socially condoned than other forms of discrimination. North and Fiske highlighted the importance for research to consider the intergenerational dynamics involved in ageism. Potential explanations for negative dynamics between the older and younger generations included fighting over resources (particularly when more elderly are using more resources, leaving fewer for younger people), prescriptive stereotypes attributed to the different generations, and clashing over age progressions (since older people are living and working longer, they retain control over resources longer, reap more resources from social programs like Social Security in the USA, and may cross generational boundaries in an attempt to be “cool”). North and Fiske discuss ageism targeting the young, stating that people can be discriminated against at any age, but note the severe lack of research of ageism against the young and suggest that older people may view younger people as uncultured and immature. For example, Loretto et al. (2000) conducted a large-scale survey that found that at least 25 per cent of young workers have reported

experiencing some form of age discrimination. Young workers described experiencing denial of promotions, demeaning attitudes from older workers, and disproportionately lower pay. Thus, North and Fiske (2012) suggested that future research address ways in which ageism affects all age groups.

Conclusion

Ageism is one form of discrimination that everyone is susceptible to in their lifetime. It is socially condoned through everyday conversations and the media. Even though it is so prevalent on a daily basis, there are many things that necessitate further action. A major issue that currently requires attention centres around US state laws concerning ageism. Some states have their own laws and others do not. Also, many of these state laws do not include workers of all age groups, particularly ones who are just entering the workforce. This chapter has provided evidence for the presence of ageism towards Millennials, as it is not limited to the US legal definition of individuals who are over the age of 40.

Past research (Falkenberg 1990) has found that individuals often use stereotypes and individuating information to either justify or suppress their prejudice towards that individual. The justification–suppression model has been applied to race (King and Ahmad 2010) and obesity (Hebl et al. 2008) discrimination but not to age discrimination. Future studies should investigate whether or not individuals can suppress age-based stereotypes with individuating information to reduce the impact of ageism in the workplace.

Since we know that there are differences among different age groups based on stereotypes that are held towards them, it is important to note that these stereotypes are not always accurate. Stereotypes are beliefs about others based on their group memberships and past experiences, but it is common knowledge that people that belong to particular groups do not necessarily hold the same beliefs and act in stereotypical ways associated with those particular groups. Therefore, people generally differ greatly within certain demographic groups, and there are generally more exceptions to the stereotype rule than support for it. For example, there are older people who love to learn about new technologies, job-hop, and enjoy learning how to incorporate innovative concepts in their jobs. Similarly, there are younger workers that do not have cell phones, avoid social media, and who plan to remain in an organisation for their lifelong career. Because role congruity theory (Eagly and Karau 2002) suggests that there may be a negative backlash when individuals exhibit characteristics that are incongruent with prescriptive stereotypes, future research

should examine what happens when people violate the accepted and prescribed age stereotypes. Specifically, how do people who are atypical to their prescribed stereotypes fare in a workplace setting: *how are they perceived, are they liked by others, are they seen as efficient?* These sorts of questions need to be addressed in order to fully understand stereotypes, ageism, and how practitioners can use knowledge about these differences (or lack thereof) and perceptions effectively in the workplace.

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Age Discrimination at Work

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Age Discrimination at Work

As noted by other authors in this volume, the workforce in most industrialised countries is becoming older and more age diverse (Eurostat 2013; Toossi 2012) largely due to people working longer for economic reasons (i.e., instead of retiring) and because of later retirement ages in many countries due to increased longevity (Vaupel 2010). Although this demographic change has a number of implications, in the context of the present chapter, it is important to note that people of different ages will be working side by side as never before. As a result, the possibility for workplace age discrimination is increasing. The good news is that age discrimination has been a topic for organisational psychologists for many years and has found increasing interest of late, and we have thus begun to accumulate a good

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theoretical and empirical basis for understanding the causes of workplace discrimination.

In this chapter, we review the issues surrounding workplace age stereotyping and discrimination. We begin by differentiating age stereotyping from discrimination and by discussing which age groups are considered (e.g., who is “old”) when assessing age discrimination. Next, we examine the extant theoretical explanations for age stereotyping and discrimination, followed by the ways in which age discrimination can play out in the workplace and the empirical work on it. We follow with an examination of when age discrimination is likely to occur and then conclude with a discussion of developing areas of research in this active field.

Stereotyping Versus Discrimination

Although the terms stereotyping and discrimination are often used interchangeably in common parlance, it is useful to differentiate them. Stereotyping refers to the process of making generalizations about the characteristics of a particular group. Common stereotypes of older workers cited in the literature include being more costly, unwilling to learn, resistant to new technology, and resistant to change, although older workers are also seen as more reliable (Bal et al. 2011; Finkelstein et al. 1995; Posthuma and Campion 2009). In contrast, discrimination involves translating stereotypes into actual workplace behaviours such as decisions about hiring, promotion, training, or performance ratings, or informal mistreatment by co-workers (e.g., exclusion). Thus, stereotyping can be considered a process that may underlie and explain some actual workplace discrimination behaviours. Put differently, stereotyping may not always lead to actual discrimination, but discrimination is often caused by some type of stereotyping.

Of course, stereotypes often do not reflect reality, and this appears to be the case with older workers: Ng and Feldman (2012) found in their meta-analysis that only one common older worker stereotype (lower motivation to learn) has a basis in reality. Moreover, other meta-analyses have shown that older workers generally hold more positive job attitudes than younger workers (Ng and Feldman 2010) and may be slightly better on some dimensions of job performance (e.g., safety behaviour, organisational citizenship behaviour, tardiness; Ng and Feldman 2008). Finally, it is important to note that stereotypes may be either explicit or implicit. Explicit stereotypes operate at the conscious level (e.g., “I think that older workers are slow”) and have been the focus of most of the explicit age stereotyping research. In contrast, implicit stereotypes may operate at an unconscious level (e.g., Greenwald et al. 1998)

and therefore may be harder to combat. We discuss this issue of explicit and implicit stereotypes in greater detail later in the chapter.

Age Categories and Workplace Stereotyping and Discrimination

With few exceptions, the workplace age discrimination literature has focused on discrimination against older workers. (We discuss discrimination against younger and middle-aged workers in the Future Research section.) However, one ongoing challenge in this field is determining who is considered an “older worker”. For many years, US research has used the “over 40” cut-off because it is the age of legal protection in the USA. In the European Union, occupational policies often consider an older worker as someone over 45. However, with people working longer these days, the age at which someone is considered an older worker is probably changing, and some sources suggest the lower bound for an older worker is age 50–55 (e.g., McCarthy et al. 2014). In addition, the question of who is considered an older worker is complicated by a number of factors, including the norms for a particular profession and whether a person’s age fits the age stereotype for that job (or the job–age stereotype, discussed later; Cleveland and Landy 1983; Perry et al. 1996; Wood and Roberts 2006) or whether the person fits with his or her expected “career timetable” (Lawrence 1988). Other operationalisations of what is meant by an older worker have focused on how close a person is to the retirement age in their particular national context (e.g., in Italy; Bertolino et al. 2013). It is noteworthy that the idea of who is an “older worker” should be differentiated from the broader category of “older person” used in much of the non-workplace stereotyping literature. This is for two reasons: First is because whether an older person is working or not can affect the stereotypes associated with them (Wood and Roberts 2006) and second is that most people of working age are not the “old old” who are at the very end of their lives.

Theoretical Mechanisms for Age Stereotyping and Age Discrimination

Before beginning a discussion of the age discrimination literature, it is useful to consider the underlying mechanisms of age stereotyping that may lead to actual workplace discrimination. In this section, we provide a summary of theoretical approaches that explain age stereotyping and thus provide a mechanism for explaining age discrimination behaviours at work.

The Stereotype Content Model: Competence Versus Warmth

One of the most well-established frameworks for understanding stereotyping across many contexts, including the workplace, is the Stereotype Content Model (SCM; Fiske et al. 2002). This model posits that individuals form their judgements about others mainly based on two dimensions: warmth and competence. While judgements related to warmth include the characteristics associated with being kind, sincere, and trustworthy; judgements related to competence refer to being skilled, capable, and intelligent. Fiske et al. (2002) suggested that individuals will evaluate each other based on how warm and competent they are perceived to be, and then these social judgements will lead them to form various stereotypes about members of certain groups.

Along the two-dimensional model of Warmth X Competence, people can be categorised into four groups: low competency–high warmth (e.g., low-status people, elderly people, or people with disabilities), high competency–low warmth (e.g., high status or wealthy people), low competency–low warmth (e.g., out-group members whom people have feelings of anger or disgust), and finally, high competency–high warmth (e.g., in-group members for whom people have admiration and are proud of). This categorization differentiates between in- and out-group members, determines whom to approach to be friends, and with whom to share valuable resources or to avoid competition.

One of the implications of SCM is that stereotypes can be mixed with both positive and negative judgements of others as in the case of elderly people. For example, among more than 20 groups of people (e.g., from housewives to businessmen, religious groups, and homeless people), Fiske et al. (2002) found that elderly people were attributed the highest warmth scores across various samples. Despite this positive evaluation, at the same time, elderly people were perceived as less competent. Thus, when applied to the work context, older workers are more likely to be perceived as warmer, more tolerant, good-natured, and sincere rather than competent, confident, independent, competitive, and intelligent compared to their younger colleagues. As a consequence of these stereotypes, older workers may face age-based discrimination at various Human Resources (HR) processes.

To answer the question of whether the high warmth–low competency stereotypes are generalised to older workers in selection processes, Krings et al. (2011) conducted a series of studies on different samples composed of business students and HR employees. Besides assessing the mixed stereotypes, Krings et al. (2011) presented the participants with hypothetical resumes belonging to younger and older workers and asked them to indicate their intention to interview the

candidates for employment. The results confirmed the general beliefs about the elderly group suggested by Fiske et al. (2002): Older workers were perceived as warmer, yet less competent than younger candidates. Moreover, the participants indicated a higher intention to interview the younger candidates than older workers even though the job required more warmth-related qualities such as interpersonal skills. In other words, these age stereotypes appeared to lead to age discrimination in terms of decisions about hiring.

Although the preliminary findings utilizing SCM as the explanatory mechanism of work-related age discrimination are promising, more research is needed to uncover the relationship between age and age-based discrimination in the workplace. Moreover, it is important to note that much SCM research on age has focused on people who are in the later decades of life, beyond the typical working years, and thus some of the non-workplace age stereotyping research that uses this model may not generalise to work settings.

Social Identity Theory, Social Categorization, and Job-Age Stereotypes

Social Identity Theory (SIT; Tajfel and Turner 1979) asserts that individuals live in a social world, where they gain their self-images based on their group memberships. An individual's relationship to a certain group can be categorised as either an in-group or an out-group member. Associating themselves with certain groups and being treated as an in-group member help individuals gain self-esteem by creating a sense of "we-ness". On the other hand, when individuals are perceived differently based on certain characteristics by the members of a group, they are treated as an out-group member, which may lead to negative perceptions about one's self.

SIT has been applied to work contexts to explain issues associated with age discrimination. Workers can identify themselves with an age group such as "older" or "younger" workers, and thus may be susceptible to negative stereotypes by out-group members. For instance, depending on the characteristics of the organisational climate and HR practices in hiring, promotion, or training, both younger and older workers can be the victims of age stereotypes (Truxillo et al. 2014). In addition, being perceived as an out-group member may lead to reduced satisfaction at work and job engagement (Desmette and Gaillard 2008).

Another age-based stereotype mechanism that may affect workers is the job-age stereotype. A job-age stereotype occurs based on the perceptions of the fit between a person's age and the stereotyped age of a certain job

(Perry et al. 1996). As Finkelstein et al. (1995) suggested, the job titles may also have an effect in the formation of job–age stereotypes. For example, job titles such as a director or the head of a department may imply a higher level of experience to people, and thus may be associated with an older age rather than a younger age. Finally, in addition to the job-specific age stereotypes, there are industry-specific age stereotypes as well (Posthuma and Campion 2009). As an example, it is easier to associate younger workers with jobs in retail and hospitality industries which have dynamic work environments, while it would be easier to match older workers with medical jobs where higher levels of professional experience are valued by colleagues and patients.

Implicit Versus Explicit Stereotypes

As we mentioned briefly in the previous sections, stereotypes may be based on either explicit (i.e., direct self-report) or implicit (i.e., not readily available at the conscious level) attitudes. Greenwald and Banaji (1995) stated that while implicit attitudes refer to the cognitive processes that occur automatically outside conscious awareness, explicit attitudes refer to those cognitive processes which are consciously controlled. This dual system of attitudes (Wilson et al. 2000) implies that the implicit attitudes towards people or objects may differ from those consciously controlled, explicit attitudes. For example, in the context of age discrimination, a supervisor may say that he/she finds older workers hard to work with (i.e., explicit stereotypes). On the other hand, due to the dual nature of attitudes, what people explicitly say may not always match with their automatic beliefs. For example, although a supervisor says he/she believes that older workers are good team members, he/she may think implicitly that they are slow and not motivated to work, or may simply not like them at the unconscious level. Therefore, detecting and changing implicit stereotypes is usually harder and may take more time than changing verbalised explicit stereotypes (Greenwald et al. 1998; Wilson et al. 2000).

Although assessing explicit age stereotypes started with self-report surveys, where people were asked about their evaluations of older people (Hummercet al. 2002), these scales may only address part of the stereotype issue: First, people may not always be aware of their attitudes with every aspect of the phenomenon; and second, even if they are aware, they may not give their honest responses due to the concerns for social desirability. In fact, these are the reasons that implicit measures originally were considered and developed.

Two methods frequently used to assess individuals' implicit stereotypes are via the cognitive priming and the Implicit Association Test (IAT). Cognitive priming relies on the activation of particular associations in memory. Priming

experiments operate based on the principle that one particular thought can affect other thoughts or behaviours without awareness (Myers 2008). For example, in a priming experiment investigating ageist stereotypes (Perdue and Gurtman 1990), the researchers examined whether age-related stereotypes occur automatically in young people. After presenting both positive (e.g., intelligent, dependable, considerate) and negative (e.g., prejudiced, irresponsible, greedy) traits to the participants on a computer screen, the researchers asked whether the trait would describe a younger (young-referent encoding task) or an older (old-referent encoding task) person. It was found that people primed with the word “older person” recalled more negative traits than positive traits. In contrast, when the participants were primed with the word “young”, they recalled positive traits more easily than negative traits.

The IAT (Greenwald and Banaji 1995; Greenwald et al. 1998) asks people to pair a target category (e.g., older people, younger people) with an evaluative category (e.g., good–bad). The assumption is that the faster the people match the target category with the evaluative category, the stronger are their implicit associations. For example, in an experiment investigating age-related bias (Greenwald et al. 2009), it was found that people paired “old” with “weak”, and “young” with “strong” faster than they did “old” with “strong” and “young” with “weak”. Similarly, Hummert and colleagues’ experiment (2002) supported more favourable implicit age attitudes towards younger people than for older people. Specifically, the results showed that participants of all ages (ages between 18 and 93) had faster response rates to the “young-pleasant” and “old-unpleasant” pairs than to the “old-pleasant” and “young-unpleasant” pairs.

One question, then, is the relative roles of implicit and explicit stereotypes in making discriminatory workplace decisions. Although there is considerable research on the effects of explicit stereotypes (e.g., Perry et al. 1996), the role of implicit stereotypes on workplace decisions is less clear and is an avenue of study that is ripe for further research. However, understanding both conscious and unconscious stereotyping processes seems important to understand and reduce discrimination in organisations, as people may be literally unaware of the age stereotypes that they bring with them into the workplace.

Workplace Age Discrimination and Implications for Specific HR Functions

In this section, we discuss levels of analysis in workplace age discrimination, the creation of subgroups and faultlines in organisations leading to discrimination where different workgroup members are treated differently, and how age discrimination may play out in different areas of HR.

Workplace Age Discrimination: Levels of Analysis

It may be helpful to make distinctions when we speak about HR policies and practices and their relationship with age discrimination, specifically, the different levels of analysis. First is the organisation level: at this level, the principles and vision of HR strategies adopted by the management are considered. For instance, at this level, Kooij and Van de Voorde (2015) distinguish between *depreciation* (considering older workers as a declining resource for the organisation) versus *conservation* (considering older workers as an asset for the organisation) philosophies related to older workers. The first of these philosophies is more likely to produce discrimination. We can assume that the vision and principles of HR management are influencing and inspiring the age culture and climate of an organisation. Research on age diversity climate (e.g., Boehm et al. 2014) would fall into this category.

A second level of analysis is referred to the implementation of the vision and principles (elaborated at an organisational level) into HR practices by the middle-level management and HR professionals. At this level, individual choices and decisions are salient in determining work and organisational outcomes and the general attitudes and behaviours of workers related to the issue of age. Examples of phenomena at this level of analysis are both the so-called idiosyncratic deals (work arrangements and solutions for specific employee needs; Knies et al. 2015) and negative actions against older workers (discrimination).

A third level of analysis concerns how workers (of different ages) perceive and experience the HR practices and treatment by their co-workers. At this individual level of analysis, it is important to understand how workers react to organisational strategies in terms of attitudes, motivation, and behaviours. An example at this level is related to the perceived justice of the organisation: how workers perceive fairness and equity in the strategies and practices of an organisation.

Differential Treatment by Co-workers: Relational Demography and Faultlines in Organisations

The similarity–attraction paradigm (Byrne 1971) suggests that individuals are more likely to like those people who are perceived as similar to themselves rather than those who are perceived as different. As an example, the similarity–attraction paradigm would be analogous to the old proverb that “birds of a feather flock together”, which stresses the role of similarity on forming

the relationships among individuals. Based on this paradigm, Relational Demography theory applies this approach to the workplace, asserting that the similarities or differences in demographic characteristics such as age, gender, ethnicity, marital status, education, and tenure are influential in people's decisions about who will be accepted as an in-group or as an out-group member (Lankau et al. 2005). As a result of this social categorization, individuals who are perceived similarly will be treated more favourably by others, and therefore will have more positive work attitudes and experiences. For example, when an individual is about the same age as the rest of his/her work group, he/she may receive more favourable treatment from colleagues and develop more positive attitudes towards his/her work (Ng and Feldman 2009). On the other hand, as the dissimilarity based on salient demographic attributes increases between an individual and others, he/she will be treated less favourably, and thus he/she will have less positive work attitudes and experiences (Avery et al. 2007). For instance, when younger workers are the majority in a work group, an older individual may get less favourable treatment from them, and start experiencing more negative job attitudes. It is noteworthy to state that while relational demography may simply operate in a dyadic level (e.g., between a manager and an employee), it may also occur in larger contexts such as in a work group or an organisation. Although studies have presented evidence supporting that demographic similarities can lead to more favourable treatments by others, scholars (Avery et al. 2007; Ng and Feldman 2009; Riordan and Wayne 2008; Shore et al. 2003) call for more research due to the mixed results across studies, and the need to examine possible moderators (i.e., satisfaction with the co-workers; see Shore et al. 2003).

Another idea based on the similarity–attraction paradigm (Byrne 1971) is faultlines research or the formation of multiple homogeneous subgroups in a work unit which shared multiple demographics (i.e., age, gender, tenure, ethnicity) or non-demographics (i.e., personality, values) attributes (Lau and Murnighan 1998; Thatcher and Patel 2011). Faultlines occur when individuals categorise themselves into subgroups based on different demographic attributes or other individual differences. A faultline based on age and gender, for instance, would create subgroups in a work place such as young and women versus old and men (Lau and Murnighan 2005).

Thatcher and Patel (2012) found that the most commonly used attribute in faultline composition is age (14 out of 61 studies) followed by educational background (11 studies) in the literature. Kunze and Bruch (2010) found a negative yet small relationship (-0.08) between age-based faultlines and perceived productive team energy in a sample of 664 German workers. Interestingly, the relationship between age-based faultlines and productive

team energy was moderated by transformational leadership, which underlined the role of supervisors in managing the age-diverse work force. Finally, in their recent meta-analysis, Thatcher and Patel (2011) examined the relationship between the strength of demographic faultlines and various work outcomes. Accordingly, the authors concluded that stronger faultlines in a work group, thus fewer overlapping characteristics with the other members on certain demographics, were associated with higher levels of conflict, and low levels of team cohesion, team satisfaction, and team performance. Although the authors suggested that the diversity in sex and race were more influential than age in forming the faultlines, they suggested that further research on age-based faultlines is necessary.

Age Discrimination Within Specific HR Activities

Recruitment and Selection

Recruitment involves a set of organisational activities to attract and then hire new employees from the external labour market when vacancies arise or to promote workers through internal selection procedures. The selection process involves organisational activities devoted to evaluating candidates and choosing which of them best fit the job requirements and the organisational culture (to promote contextual performance and adaptive organisational behaviour). Selection involves gathering information about the (internal or external) candidates through different tools (e.g., tests, biodata, interviews). Obviously, there are no explicit and formal recruitment processes “reserved” for different age groups of candidates, nor there are formal selection criteria based on age, as both of these would violate the rights of equal access to employment.

In terms of age and *recruitment*, it is possible to imagine recruitment processes targeted towards adult or older workers (Wang et al. 2012). One of the current issues in the labour market of many economically advanced countries is the capacity to reallocate unemployed older people in the workforce. In this regard, notwithstanding the extreme heterogeneity of jobs, different target categories can be identified: mature persons with advanced skills (for instance, technical or managerial) and long experience in similar jobs; low-skilled workers on flexible, part-time, or fixed-term contracts (particularly women); and retired persons returning to work (bridge employment experiences), to name a few. But the questions remain: What can be done for arranging recruitment processes that do not implicitly discriminate in terms of age? And how should organisations develop recruitment procedures that could attract people from

different age groups, and particularly older workers? However, the research and practice in this area are not yet developed. Truxillo et al. (2014) listed a series of existing data about the factors that could be the best attractors for older workers in the recruitment process, but these issues have received scant examination in the research.

Considering the *selection* process, studies have found evidence for more negative stereotypes towards older workers during selection and hiring processes (Bal et al. 2011; Richardson et al. 2013). Truxillo et al. (2014) identified three types of issues related to age: age bias and stereotypes in selection, the potential for mean differences on selection procedures by age, and differential validity of selection procedures for different age groups. On the first point, research shows that older job applicants are less likely to be hired compared to younger applicants. Some reasons include negative perceptions and stereotypes about older workers' productivity, cognitive ability, motivation, and tenure (Bal et al. 2011; Posthuma and Campion 2009). Recruiters could apply these beliefs (even in an implicit and unconscious manner) during the decision-making process. In fact, the likelihood of age stereotypes translating into discrimination seems more likely during the selection of external candidates than in other HR practices since the decision-maker has relatively little additional "differentiating" information about the candidate other than their age.

Research on the second and third points—adverse impact and differential validity of selection procedures—is less developed in terms of age and deserves further study. Adverse impact implies potential differential performance by age on certain selection procedures, such as cognitive ability or personality tests. The structural differences by age in terms of fluid intelligence (older people usually are affected by a decline in this cognitive resource; Schaie 1994) and some personality facets (e.g., conscientiousness; Roberts et al. 2006) could have some repercussions in test performance, resulting in different levels of performance for older and younger people. This issue of "adverse impact" or mean differences between older and younger job applicants is an issue that has received little attention.

A related area that has received little scrutiny by scholars is the differential validity of selection procedures by applicant age (Truxillo 2009). The system of competencies of an older worker is mainly composed of "crystallized" knowledge and procedural skills deriving from experience and seniority. Frequently, the tests used in selection procedures are based on different types of criteria involving declarative knowledge, working memory activities, and fluid intelligence. In short, the most commonly used selection practices may not be predictive of what is good performance for an older worker, or may be differentially predictive compared to younger applicants.

Opportunities for Training and Development

There is substantial empirical evidence that older workers are neglected in the organisational policies of training and HR development. Data reported by Sterns and Miklos (1995) show that the aggregate investment in workplace training programs at that time in the USA was larger for younger employees compared with the investment for older employees. Armstrong-Stassen and Templer (2005) reported that in Canada only 5 per cent of enterprises participating in the study adopted training programs for older workers, and only the 10 per cent of people over 55 took part in training activities. The Organisation for Economic Cooperation and Development (OECD) website, in a special page devoted to *Ageing and Employment policies*, reports a series of recommendations for different European governmental institutions for improving training, skill acquisition, and skill update policies in favour of older workers. Greller and Simpson (1999) explained this training discrimination by organisations in terms of presumed “low pay back” of investment in older workers human capital. Following a neoclassical economic point of view, training for older people could be interpreted as having only short-term benefit for the organisation, retraining people at a high cost and with a low return of investment.

Training discrimination is also founded on some stereotypes related to the willingness and capacity of older workers to engage themselves in learning and developmental processes. In fact, Ng and Feldman's (2008, 2012) meta-analyses did give some confirmation to this one particular older worker stereotype: Older workers perform less well than younger workers in terms of knowledge acquisition and have a lower training motivation. But it is well established that older workers can benefit from training particularly when it is tailored to their specific needs, is related to previous work experience, and can lead to an interesting and challenging job assignment (Beier et al. 2012). Finally, fair access to training and development practices are important for older workers in improving perceptions of organisational support and in creating a positive organisational age climate (see Boehm et al., 2014). In this sense, training practices may facilitate the retention of older workers in organisations (Armstrong-Stassen and Ursel 2009).

Performance Appraisal

In their studies conducted with four types of younger and older employee–manager dyads (i.e., old employee–old manager, young employee–young

manager, old employee–young manager, and young employee–old manager), Shore et al. (2003) reported the lowest managerial ratings of potential and promotability for the dyads of older employees–younger managers. However, as noted earlier, despite stereotypes to the contrary, few performance differences are observed between older and younger workers. Where there are differences, older workers are generally found to perform slightly higher than their younger counterparts on performance dimensions such as organisational citizenship behaviours and safety behaviours (Ng and Feldman 2008). It is worth noting that despite these slight increases in performance with age, there is also meta-analytic evidence that subjective performance ratings show that older workers are rated lower than their younger counterparts (Waldman and Avolio 1986). Research has also found less tolerance for older workers in the performance evaluations by the employers (Van Dalen et al. 2010). However, given the age of some of these findings, and given that some perceptions of older workers may be becoming more positive (Bertolino et al. 2013; Truxillo et al. 2012; Weiss and Maurer 2004), these conclusions about the subjective ratings of older workers may not still hold true (cf., Ng and Feldman 2008).

Retention

Retention consists of a set of HR strategies intended to keep valued personnel within the organisation, preventing the loss of talent and organisational knowledge. Retention programs commonly used in organisations are the development of the employees' careers (e.g., opportunities for professional growth); training and skills development (e.g., training programs); strengthening organisational identification (e.g., socialization, improvement of the organisational climate); job design; and personnel policies centred on the recognition of merit, organisational justice, and the provision of frequent and constructive feedback to workers. Retention strategies may differ according to the age of employees, and they should take account of organisational demography and internal generational differences (Bal et al. 2015). For older workers, that may involve employment arrangements offered to individual workers and tailored to their characteristics and the contingent needs of the organisation (Paullin and Whetzel 2012).

Unfortunately, international data show that the corporate system is not completely prepared to offer these “retention” opportunities to older workers. Paullin and Whetzel (2012) reported that approximately two-thirds of older workers are concerned with discrimination in workplace, and around 15–20

per cent of them report experiencing age discrimination. In a representative sample of workers from 31 European countries, the *European Agency for Safety and Health at Work* (2013) asked participants if in their firms some policies or interventions have been activated to help older people continue working in late career or after retirement age. Only 12 per cent of workers declared to be aware of such policies and interventions. Further, the preparedness of the corporate system to manage older workers' policies is really different by country: For instance, the percentage of workers aware of such policies was 4 per cent in Italy, whereas it was around 20 per cent in the Netherlands and England. Moreover, Paullin and Whetzel (2012) highlight that the retention interventions in organisations are mainly sporadic and reactive and are rarely evaluated, and the authors recommend a more strategic view of the retention strategies considering the entire career path of the workers inside the organisation. From the employee point of view, these deficits in retention policies—such as differences in promotions, performance ratings, and training opportunities, cited earlier—lead to perceptions of discrimination in career management and development activities for older workers (see Truxillo et al. 2014 for a review).

When is Workplace Age Discrimination Most Likely to Occur?

As described in previous sections, there are a number of stereotypes of older and younger workers, both positive and negative. The question is whether, and how, such stereotypes may lead to actual workplace discrimination behaviours. One meta-analytic study (Finkelstein et al. 1995) examined differences about how raters of different ages (i.e., younger vs. older raters) rated targets of different ages (i.e., younger vs. older targets) when asked to make simulated employment-related decisions for various work-related conditions (i.e., job qualification, potential for development, stability, interpersonal skills, and qualification for a physically demanding job). The results assessing whether any in-group and out-group biases occurred in the employment decisions showed that younger people rated younger workers more favourably in having more job qualification, more potential for development, and being more qualified for a physically demanding job than older workers. On the other hand, younger people rated older workers more favourably in being more stable than younger workers. In sum, the authors concluded that age discrimination occurred against older workers when the raters were young, in the absence of job-relevant information about the

workers, and finally, when raters were asked to rate old and young workers concurrently.

However, age stereotypes do not always lead to negative decisions about workers or to unfair or uncivil treatment. For example, the teams literature suggests that “surface traits” such as age may be less likely to affect team relationships as team members come to know each other better over time, as opposed to deep traits like personality and skills that can affect team relationships long term (e.g., Harrison et al. 2002). In the same way, age stereotypes are more likely to affect workplace decisions about older people in situations where the decision-maker knows less about the target (e.g., Finkelstein et al. 1995). An example would be during hiring decisions when a hiring manager has little “differentiating information” about a job applicant other than his/her demographic characteristics and will thus be more likely to rely on these surface traits (e.g., age, gender). In contrast, at least in theory, managers making performance appraisal decisions about their team members should be less affected by the age of the team members in question because the manager would at that point have much more information about the employees other than their age.

In addition, there are other factors that may cause age stereotypes to lead to actual discrimination, although some of these issues remain open research questions. For example, as noted earlier, there is evidence that the job—age stereotype (i.e., the fit between a person’s age and the stereotyped age of the job) can affect hiring decisions made about older and younger candidates (e.g., Perry et al. 1996). In addition, discrimination is more likely to occur when decision makers are more cognitively busy (e.g., distracted, under time pressure; Perry et al.) However, although there is evidence in other stereotyping literature for the effects of both explicit and implicit stereotypes (e.g., Greenwald et al. 1998), when implicit age stereotypes will actually lead to discriminatory workplace decisions remains under-explored. Further, the role of decision-maker characteristics (e.g., personality) in affecting workplace discrimination is an area ripe for future research, as are which policies and practices can reduce workplace age discrimination.

Future Research

In addition to research issues we have mentioned throughout this chapter, we see several areas that are particularly ripe for future research in explaining age stereotypes at work and whether these manifest in age discrimination behaviour.

Discrimination Against Younger Workers and Middle-Aged Workers

Although workplace age stereotyping research has generally focused on older workers, there are reasons that younger worker stereotypes and discrimination should be given more attention. Replications (e.g., Weiss and Maurer 2004) of earlier age stereotyping studies (e.g., Rosen and Jerdee 1976) suggest that the negative stereotypes which had been associated with older workers may be getting more positive or at least changing. Accordingly, older workers may be perceived more positively on certain dimensions than their younger counterparts. For example, older workers are seen as being more conscientious, less neurotic, and higher on certain types of organisational citizenship behaviours than younger employees (Bertolino et al. 2013; Truxillo et al. 2012). Indeed, stories in the popular press suggest some negative stereotypes of younger workers (e.g., “entitled millennials”) may be developing. Finally, middle-aged workers are generally ignored in the workplace age stereotyping literature, perhaps considered a group that faces relatively little age discrimination.

Although the workplace age discrimination literature has focused overwhelmingly on older workers, there is also cause for concern for younger workers. As noted by some authors, age discrimination norms may be changing (e.g., Truxillo et al. *in press*), perhaps as baby boomers’ age and continue to stay in the workplace, with older worker stereotypes no longer entirely negative. This is also not surprising as pieces in the popular press often refer to “entitled” Millennials, and in fact there is evidence that younger workers appear to be seen as more neurotic and less conscientious than their older counterparts (Bertolino et al. 2013; Truxillo et al. 2012). Future research should focus explicitly on workplace discrimination against younger workers taking into account the stereotypes associated with them.

Moreover, middle-aged workers are largely ignored in the workplace age discrimination literature, sometimes assumed to be the “white males” of the age discrimination literature who do not face discrimination (Truxillo et al. *in press*). However, age discrimination can affect people of any age. For example, middle-aged workers may experience stereotyping and discrimination related to what is considered appropriate career progress for their age (Wood et al. 2008) if they fail to make expected career progress (Arrowsmith and McGoldrick 1997). Future research should also focus on workplace discrimination against middle-aged workers.

Multiple Categories

In addition to age, other individual aspects (e.g., gender, ethnicity/race, physical and mental disability) can be related to workplace discrimination. Discrimination can take place in a context where a number of individual characteristics can interact to create subgroup categories of workers more at risk (e.g., older women employees, older workers with mental illness). In other words, a number of potential moderators can intervene in the relationship between age and discrimination. However, there is little research on the combined effects of age and other individual differences in studying workplace discrimination. Gender stereotypes and discrimination in the workplace have been intensively studied in the last decades (e.g., Heilman 2012; Paludi and Coates 2011), with women facing more workplace discrimination compared to men in selection, career progression, and retribution (e.g., Heilman 2012). However, gender and age can act together to create a situation of “double jeopardy” (DeRous et al. *in press*). Similarly, racial discrimination is frequently experienced by immigrants and ethnic minorities (Wrench 2007). For example, a study on the association between racial and ethnic discrimination and psychological distress found that for Asian American individuals of 31–40 and 51–75 years, ethnic identity exacerbated the negative effects of discrimination on mental health (Yip et al. 2008). Another well-known form of discrimination in the workplace is related to mental and physical disabilities. Past research highlights multiple barriers that prevent people with mental disabilities from becoming active participants in the labour market (e.g., Stuart 2006). Although age is correlated with certain types of physical disabilities, there is little research on the combined effects of mental (and physical) disabilities and age on discrimination (see Boehm and Dwertmann 2015 for a recent integration of these literatures). In summary, compound sources of discrimination should be considered in future research, considering other individual characteristics in addition to age.

Intergenerational Issues

Another mechanism used to explain the age discrimination at work is intergenerational issues, namely the coexistence of different generations at work. As members of generations share similar historical experiences, values, and attitudes, it may be easier for members of the same generations to communicate with each other, interpret the events in similar ways, and perceive each

other as in-group members. On the other hand, the existence of different generations in the same workplace may accentuate the differences between in- and out-group members.

Research on generational issues and work attitudes (e.g., Gursoy et al. 2008; Marston 2007; Twenge et al. 2010) suggests that Baby Boomers (born between 1946 and 1964) value work more than their younger generations, are work-centric, more loyal to their organisations, and motivated by extrinsic rewards in turn of their hard work. On the other hand, members of Gen X (born between 1965 and 1980) are described as more individualistic and independent compared to Baby Boomers, and their need for autonomy and freedom is considered high in decision-making. Finally, the Millennials (aka Gen Y; those born between 1981 and 1999) perceive their career as a means to support their life, value work-life balance, prefer jobs that allow flexibility for leisure time, seek open communication, and frequent feedback from their supervisors. However, an issue that continues to challenge this work on generations is disentangling generational effects from those related to normal biological and social aging (Costanza and Finkelstein 2015). Moreover, these workers of different generations may not be helpful: Given the considerable variability of individuals within a generational cohort, such stereotypes perpetuate overgeneralizations about people of certain age groups (Cadiz et al. 2015).

Meta-Stereotypes

Increasing age diversity in the workplace underlines the need to understand interpersonal relations across age groups. A new but promising research aspect of these interactions involves interpersonal perceptions of “what other people think of my group”. The expectations that people believe other age groups have of their own group is not itself a stereotype but a meta-stereotype (Finkelstein et al. 2013; Voyles et al. 2014). Despite the vast literature on stereotyping, meta-stereotypes are still understudied, in particular as related to age in the workplace. Moreover, meta-stereotypes may play a role in the age discrimination process in the workplace. Finkelstein et al. (2013) examined stereotypes and meta-stereotypes in three groups of workers: younger (18–30), middle-aged (31–50), and older (over 51). The authors found that the younger group has high opinions of their older colleagues, indicating stereotypes that were about 60 per cent positive. Regarding meta-stereotypes, however, older workers did not expect that younger workers had positive beliefs about them. This misalignment between what younger workers think

about older workers, versus what older workers believe younger workers think about them, provides an interesting lens for studying workplace age relations: Negative meta-stereotypes could lead to problems in cross-age interactions at work, such as inappropriate judgements and behaviours to counter these meta-stereotypes. However, research is still needed to better understand the effects of age meta-stereotypes at work.

Perceived Overqualification

Overqualification is defined as “a situation where the individual has surplus skills, knowledge, abilities, education, experience, and other qualifications that are not required by or utilized on the job” (Erdogan et al. 2011: 217). Erdogan et al. (2011) stated that overqualification is a type of person–job mismatch, where the person’s qualities such as skills and abilities do not match, and in fact, exceed, the requirements of the job. The two most common indicators of whether employees will be perceived as overqualified are education and experience or tenure in the job. Since age is associated with both of these two factors, employers may be less willing to approach older workers due to the concerns that their accumulated job knowledge, skills, and abilities will be “too much” for the job. Thus, this could lead to negative perceptions of older candidates as being costly, having low commitment to the organisation, low job satisfaction, low motivation to work, and higher intention to quit (e.g., Posthuma and Campion 2009). As an example, a recent MBA graduate applying for a job in a call centre is likely to be evaluated as too qualified. However, in line with young versus old age biases, it would be easier for employers to associate younger overqualified workers with positive characteristics such as being competent and innovative (Finkelstein 2011) compared to older overqualified workers. In other words, being both overqualified and older may elicit more negative associations. As suggested by Erdogan et al. (2011) and Posthuma and Campion (2009), more research is needed on understanding the role that overqualification plays in age discrimination. Other examples about older worker stereotypes related to overqualification include the belief that older workers are more expensive for the organisation in terms of training, health costs, higher turnover, and that a higher position is expected by older workers to match their qualifications and experience, though these stereotypes are generally inaccurate (e.g., Ng and Feldman 2008, Ng and Feldman 2012). In short, future research in age discrimination should consider perceived overqualification and costliness as possible causes of workplace discrimination.

Terror Management Theory

Terror Management Theory (TMT; Greenberg et al. 1986; Solomon et al. 1991) suggests that, as human beings, we are aware of our own mortality, which causes terror. To manage the frustration of death, people are motivated to build a cohesive world by engaging in actions to derogate those who increase their anxiety associated with death (Myers 2008). Because older people are more easily associated with death than are younger people, younger individuals may distance themselves from older ones as out-group members. They may show signs of aggression towards older people such as blaming them for their state of becoming old (Nelson 2005). Within a work context, differentiating between in- and out-groups may leave older workers in a disadvantaged position resulting in negative outcomes such as less cooperation among young and older workers, and hostility, and workplace aggression. However, thus far, there has been little empirical research explicitly tying work-related age stereotypes and discrimination to TMT, and the theory may have less relevance in work settings, where “older workers” are largely not in the very final years of life.

Interventions to Reduce Stereotypes and Discrimination

Given the increased age diversity in the workforce, there is the potential for increased tensions in work teams (Böhm et al. 2011). Although there is little research on formal interventions that can be taken by organisations to address age differences (Truxillo et al. *in press*; Truxillo et al. 2015), we believe that there are a number of worthwhile approaches that could be considered to reduce age discrimination in organisations. First, the development of a positive age climate leads to a healthy organisation, reducing turnover and improving organisational performance (Boehm et al. 2014). As a positive age climate appears to stem from inclusive organisational HR practices, it seems important for organisations to actively implement such practices and for research to study the effectiveness of organisational interventions to improve age climate. Research on the improvement of age climate could benefit from the findings of other climate studies such as safety climate which emphasises the pivotal role of the supervisor (e.g., Zohar and Polacheck 2014) and interventions to improve supervisor support for safety. In addition, there is also evidence that positive intergenerational contact can improve relations between workers of different ages (e.g., Iweins et al. 2013). One path for intervention research,

then, is to consider ways that a surface-level variable (e.g., Harrison et al. 2002) like age becomes less salient to employees and has minimal effects on their perceptions of others.

Conclusion

An increasingly age-diverse workforce is fraught with opportunities for friction between age groups and age discrimination. Both older and younger workers face the possibility of age discrimination at work, and a number of theoretical explanations have emerged as possible explanations for age stereotyping and resulting age discrimination. This is an area that is ripe for further study and presents an opportunity for Industrial/Organizational Psychology/Organizational Behavior (IO/OB) researchers to support the well-being and productivity of the twenty-first-century workforce.

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Part V

Age Diversity in Context

Employment of Workers Aged 65 and Over: The Importance of Policy Context

David Lain

Across many European Union (EU) and Organisation for Economic Co-operation and Development (OECD) countries, employment beyond age 65 is growing (Dubois and Anderson 2012; Lain and Vickerstaff 2014). Employment beyond age 65 is not a new phenomenon, however. Historically, it was common for workers to be retained within organisations when they reached older age, with workplace arrangements that often moved them into 'light work' (Phillipson 1982). With the advent of more bureaucratic organisational practices, however, employers increasingly encouraged individuals to retire at fixed and predictable ages. From the late nineteenth and early twentieth centuries, mandatory retirement ages slowly began to spread in the UK, starting with bureaucratically organised employers such as the civil service and banking. In this context, occupational pensions were increasingly used by employers in countries such as the UK to encourage individuals to retire (Hannah 1986). The spread of state pensions in OECD countries resulted in further large declines in employment past age 65 (Ebbinghaus 2006). Sixty-five became institutionalised as the male state pension age across many countries, with earlier pensions sometimes provided for women. By the 1980s, only around 7–8 per cent of men worked past age 65 in the UK, with employment remaining at this level until the late 1990s (Lain 2011).

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From the early 2000s onwards, the proportions of over-65s working started to increase in the UK and other OECD countries. However, these increases started from very different initial levels and the extent of employment growth has also varied. By 2013, employment beyond age 65 in the UK was relatively high compared with other EU countries, but lower than in other English-speaking countries. This chapter explores UK employment beyond age 65 in an international policy context. It starts by comparing employment at age 65–69 between countries. It then discusses two policy areas that are likely to influence employment levels: pensions and employment rights. Pension changes in countries such as the UK and USA have made it more attractive, and necessary, to work past age 65. At the same time, we see restrictions on the ability of employers to set mandatory retirement ages in English-speaking countries, including most recently in the UK. This enables many of those in work at age 64 to continue working past age 65 and beyond. In this context, UK employment at ages 65–69 almost doubled between 2001 and 2014. As the analysis in this chapter shows, this is primarily because of long-term workers remaining in employment past age 65. Over-65s are now more integrated into employment across occupational groups, sectors of employment and sizes of workplace. This has implications for the management of age-diverse workforces, something we discuss in the conclusion.

The Growth and Diversity of Employment Levels Beyond Age 65 Across Countries

Figure 19.1 shows employment rates between ages 65 and 69 across a range of countries in 2002 and 2013. The countries are ranked by the level of employment in 2013 from left to right of the figure. Employment for this age group rose at least marginally in all of the countries except four: Greece, Slovenia, Poland and Portugal. Nevertheless, despite general increases in employment, there remained significant differences between countries in employment levels at age 65–69. In 2013, we can see that the UK had higher employment than in most of the other EU countries. It should also be noted that self-employment dominated among this age group in many of these other EU countries. For example, Portugal had relatively high employment in 2002 and 2013, but in 2011, 86 per cent of workers aged 65+ were self-employed (Dubois and Anderson 2012: 39; see also Lain and Vickerstaff 2014: 243). According to analysis by Dubois and Anderson (2012: 39), 50 per cent of workers beyond age 65 were self-employed in the EU in 2011 compared with 38 per cent in the UK. There are a number of reasons why self-employed

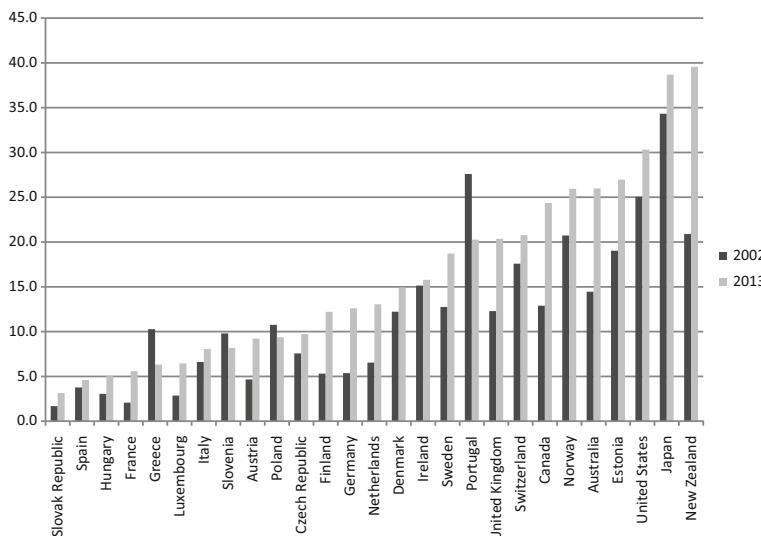


Fig. 19.1 The percentages working at age 65–69 by country, 2002 and 2013
 (Source: Compiled by author from http://stats.oecd.org/Index.aspx?DatasetCode=LFS_SEXAGE_1_R#)

might be more likely to work beyond age 65 (Lain and Vickerstaff 2014). First, they may be less constrained by organisational regulations, policies or collective agreements that make working beyond this age difficult. Second, it is possible that they have more control over their working hours and workload than regular employees, which makes continuation in work more attractive (Lain and Vickerstaff 2014). Third, the self-employed may have amassed smaller pensions than employees in many cases, which increases the financial need to work (Dubois and Anderson 2012). Clearly, from an organisational age-diversity perspective, we are most interested in employees; and in a number of EU countries, the majority of workers are actually self-employed.

Countries with higher employment beyond age 65 than the UK in 2013, on the right of Fig. 19.1, are all non-EU countries except one (Estonia). It is unclear why employment is relatively high in Estonia—the state pension age was below 65 in 2013 (OECD 2013) and we do not know whether self-employment was high among over-65s (Dubois and Anderson 2012: 39). In the case of Switzerland, relatively high employment may be explained to a degree by self-employment, which is likely to have dominated for this age group. In 2011, the proportion of over-65s working as *employees* appears to have been lower in Switzerland than the UK, once we disregard the self-employed (see Lain and Vickerstaff 2014: 243). In the case of Norway, high levels of employment exist alongside a state pension age of 67 in 2002 and

2013 (OECD 2011: 25, 2013: 129). Norway is very unusual in having a state pension age of 70 until the 1970s, and 67 thereafter (OECD 2011: 25). More generally, high employment in these countries cannot be explained by state pension ages above 65. Only one other country, the USA, had a normal state pension age above 65 in 2013 (at age 66). However, employment for this age group was also high in the USA in 2002, when ‘normal’ state pension age was 65. Likewise, we see very high employment in Japan in both time periods, despite a state pension age of 61 in 2002 (OECD 2011: 25) and 65 in 2013 (OECD 2013: 129). Japan, however, has what is likely to be a unique model of employment in older age (Flynn et al. 2014; Casey 2007). It is not uncommon for employees to be forced to retire at a mandatory retirement age, only to be rehired in a less senior role either within the firm or in a subsidiary company (Casey 2007).

Once we have made allowances for Switzerland, Norway, Estonia and Japan, we are left with English-speaking countries in the ‘top ten’ countries for employment; these are the UK, Canada, Australia, the USA and New Zealand. While self-employment is *relatively* high in all these countries for this age group, the majority of these workers are likely to be employees (see Lain and Vickerstaff 2014: 243). Only one of these countries, the USA, already had high employment past age 65 in 2002. The UK, Canada, Australia, and New Zealand, on the other hand, saw significant employment increases for this age group between 2002 and 2013.

Two factors in particular are likely to influence increases in employment beyond age 65 in these English-speaking countries. Changes to state and occupational pensions are likely to increase the attractiveness, and necessity, to work at this age, although the impact of this in the UK is likely to be more important in future than in the recent past (see below). Second, these large employment increases are likely to be in part due to the introduction of restrictions on the use of mandatory retirement ages by employers in these countries. The USA already had high employment in 2002, in part, because it abolished mandatory retirement much earlier, in 1986. This move, alongside earlier federal and state-based age discrimination legislation, is likely to have helped maintain relatively high levels of US employment beyond age 65 (Lain 2011). Employment rates rose in the other countries in the context of more recent restrictions on the use of mandatory retirement. New Zealand abolished mandatory retirement earliest, in 1999, and saw the largest growth in employment past age 65; Australia followed this path in 2004 (Wood et al. 2010). Canada finished abolishing mandatory retirement in 2009, although the process began much earlier at a province level (Wunsch and Raman 2010). A number of Canadian provinces that still allowed mandatory retirement in

2002 have since abolished it (Ontario, Newfoundland, Labrador, British Columbia, Saskatchewan and Nova Scotia; *ibid*). Finally, in 2011, the UK abolished mandatory retirement except where a legally justifiable reason could be given (see below). However, this move in the UK was preceded by the ‘right to request’ continued employment beyond age 65 in 2006; this first step towards abolishing mandatory retirement may have contributed to the rise in employment over this period.

To summarise the above discussion, in the English-speaking countries discussed above, we see a rise in employment past 65 in the context of changes to pensions and employment rights. We therefore explore the effects of these factors on employment past age 65, before going on to examine the changing nature of employment at this age in the UK.

Pensions and Financial Influences on Employment

Previous research suggests that pensions and broader financial incentives are important influences on working in older age (for a discussion, see Lain 2015a). Gruber and Wise (1999), for example, found that poor financial incentives to continue working in some countries resulted in early exit. In Germany and France, people tended to exit earlier than in the USA because the financial rewards in terms of enhanced pension wealth were not sufficient to compensate for working longer and receiving the pension for less time.

Within English-speaking countries such as the UK, USA and Canada, financial incentives to leave work have often been most significant in occupational pensions. Defined Benefit (DB) pensions, which provide regular salary-related payments after retirement, have tended to dominate historically and have encouraged early exit (Lain and Vickerstaff 2014). This is partly because people have often had to retire to receive a pension, and individuals that delay taking them were not always fully compensated for the shorter period of receipt. Pension reforms in the UK in 2006 made it easier for employers to pay a pension to a current member of staff, rather than making them retire to receive it (Lain *forthcoming*). Likewise, The US Pension Protection Act 2006 enabled people to take an occupational pension from age 62 and continue working for the same employer (Johnson 2011: 76). These reforms may reduce the extent to which having a DB pension encourages exit.

In countries such as the UK, USA, and Canada, DB pensions are also increasingly being replaced by Defined Contribution (DC) schemes. DC pensions make continued employment beyond age 65 particularly attractive because another year of work adds directly to the lump sum ‘pension pot’

received on retirement. Employers also tend to pay less into DC schemes, increasing the potential financial need to work (Lain *forthcoming*). Evidence from the UK and USA suggests that people with DC pensions retire later *on average* than those with DB pensions (Arkani and Gough 2007; Banks et al. 2007; Munnell et al. 2004; Friedberg and Webb 2005). The rise of DC pensions is therefore likely to contribute to an increase in employment beyond age 65 (for the USA, see Friedberg and Webb 2005). However, the extent to which this shift to DC pensions explains recent increases in employment beyond 65 in the UK should not be overstated. Analysis by Banks et al. (2007) found that in England, the influence of pension incentives on employment was mainly evident for men in their 50s, not those in older groups. Lain (*forthcoming*) finds that, in contrast to the USA, employees in England contributing to DC pensions in 2002 were *not* more likely to work at age 65–72 in 2012 than those with DB pensions. This is likely to reflect the fact that in the USA, individuals were *able* to respond to financial incentives and work beyond 65 because mandatory retirement was abolished (Shultz et al. 1998); in England/the UK, mandatory retirement was only abolished in 2011. The influence of UK pension incentives on employment beyond age 65 is therefore only likely to become fully apparent *in future*.

In addition to occupational pension changes, other financial factors are likely to increase employment beyond age 65 in the UK and USA. State pension ages in both countries are likely to rise to 67 for men and women by 2027, reaching age 69/70 over time if they are linked to life expectancy projections as currently proposed (Béland and Waddan 2012; Clark 2013). Opportunities to obtain means tested US Supplemental Security Income and UK Pension Credit before state pension age are also diminishing (Lain *forthcoming*). In the USA, we also see a large increase in people over the age of 62 with outstanding mortgage debts (Butrica and Karamcheva 2013). Having an outstanding mortgage increases the likelihood of working past 65 in both the USA and UK (Butrica and Karamcheva 2013; Smeaton and McKay 2003). This, therefore, is likely to place financial pressure on individuals to work past 65.

While acknowledging the importance of financial factors on employment, it is important to recognise that this is only one of a number of influences. It should be noted, for example, that people work in older age for a range of reasons, both financial and non-financial. Individuals may want to remain in work due to intrinsic rewards from the work itself or because of the social aspects of working (Scherger et al. 2012; Parry and Taylor 2007). Analysis of the English Longitudinal Study of Ageing found that around two-thirds of people working past state pension age said they were primarily motivated to work by non-financial factors (Scherger et al. 2012: 56). This is consistent

with previous research suggesting that, compared with younger people, older people are more likely to have intrinsic rather than extrinsic work motivations (Inceoglu et al. 2011).

One should be slightly wary about attributing a shift towards intrinsic work motivations entirely to the ageing process, however. People remaining in work in older age may be those that always had strong work orientations (McNair 2006). As there are increasing financial pressures to work past age 65, we may see more evidence of financially motivated employment past age 65. Nevertheless, employment for this age group clearly cannot be simply reduced to financial considerations. We should also note that many of those with the greatest financial need to work past age 65 are least likely to actually do so, because low levels of health and education make employment difficult (Lain 2011; Haider and Loughran 2001; Crawford and Tetlow 2010; Komp et al. 2010). Indeed, while the financial profile of workers aged over 65 is diverse, there is persuasive evidence that the wealthiest are most likely to continue working (Haider and Loughran 2001; Lain 2011; Crawford and Tetlow 2010).

Financial incentives are therefore insufficient on their own for explaining employment beyond age 65. Nevertheless, a number of pension reforms have been enacted to make it more attractive to continue working. In both the UK and USA, earnings limits have been removed from the state pensions (in 1989 and 2000, respectively). This means that people can continue working past state pension age while receiving a full state pension. In the USA, since the 1980s, employers have also been compelled to continue contributing to pensions for as long as the individual continues working (Quadagno and Hardy 1991). As noted above, UK and US reforms in 2006 make it easier for many employers to pay a pension to someone still in work past age 65 (Lain *forthcoming*). Some of the concerns expressed by Gruber and Wise (1999), about people leaving work in order to get a pension, are therefore not as important as they were in the past. Interestingly, in the case of New Zealand, where employment levels past age 65 have grown considerably, there has always been little incentive to delay receipt of the state pension. In the UK, USA and New Zealand, most individuals working past age 65 take their pension at the same time (Lain and Vickerstaff 2014).

Employment Rights

While pension changes increase the attractiveness of working beyond age 65, employment increases in the UK, Canada, New Zealand and Australia occurred in the context of restrictions on mandatory retirement. As noted

above, mandatory retirement clauses in contracts emerged in the UK in the late nineteenth century and became increasingly common as the twentieth century progressed. In the early 2000s, around half of UK employees worked for an employer with mandatory retirement clauses in their contract, usually at age 65 or below (Meadows 2003: 2; Metcalf and Meadows 2006: 65).

Explanations for mandatory retirement draw on a number of factors (see Macnicol 2006). In the background to some of these accounts, it is assumed that work productivity declines at a particular age, typically 65, and mandatory retirement is therefore used by employers to remove older workers. This explanation is too simple because the productivity of older people is too diverse to be captured by a particular age. An alternative explanation offered by Edward Lazear (1979) is that mandatory retirement was used alongside remuneration to instil loyalty and prevent shirking. Employees are said to be underpaid in the early years, relative to their productivity, with the promise that their wages will increase over time if they remain with the company. Employers are therefore said to use mandatory retirement (perhaps with a pension) when the worker becomes too expensive relative to their productivity. It is argued that mandatory retirement is not inherently discriminatory because everyone ages and therefore potentially benefits at younger ages from the opportunities arising when colleagues retire (see below for arguments in opposition to this position). Mandatory retirement is said to 'free up blockages to promotion' and ensure that opportunities are available for younger workers (Macnicol 2006). It is argued that mandatory retirement is an understood and accepted part of the employment relationship. Survey evidence from the 1980s shows that UK workers largely accepted mandatory retirement as being a fair arrangement (Hayes and Vandenheuvel 1994). It is also argued that the mandatory retirement allows employers to plan staffing levels, because they have some idea of when people will leave.

These arguments have been challenged considerably in English-speaking countries. In the context of the broader civil rights movement in the USA, concerns about age discrimination arose in the 1960s. Inaccurate negative employer stereotypes about older people were said to damage the economy and unfairly deny work to older people (Macnicol 2006). Studies showed that the work capabilities of older people were extremely diverse. It was therefore argued that management systems that monitor and support individual performance, rather than relying on arbitrary fixed retirement ages, are more effective and equitable. Such arguments challenge the idea that it is demotivating to have your performance managed in older age. Indeed, it

is argued that *not* having your performance managed and supported may be demotivating, if skills become obsolete and people feel they are no longer valued as employees.

The wider proposed social benefits of mandatory retirement, in terms of ensuring young people have jobs to move into, was also challenged. This perspective rejected the so-called 'lump of labour fallacy' that assumes there are a fixed number of jobs in the economy that can be redistributed to young people via mandatory retirement (Macnicol 2006). It is argued that older people do not 'take' the work of the young because they tend to do different jobs. Indeed, older workers may facilitate the recruitment of younger employees, if they provide the labour to manage these young entrants. Furthermore, proponents of this view point to the fact that countries with high early retirement rates have not had corresponding high levels of youth employment (Gruber and Wise 2010).

In the context of debates about age discrimination and its negative economic consequences, the USA made the first moves towards abolishing mandatory retirement. State-based age discrimination legislation emerged as early as in 1960 (Neumark and Stock 1999). This was followed by the federal-level Age Discrimination in Employment Act 1967, which covered individuals aged 40–65 (Neumark and Stock 1999). In 1978, mandatory retirement before age 70 was prohibited in most circumstances. From 1986 onwards, mandatory retirement was effectively abolished in most cases when the upper age limit for protection from discrimination was removed. Employers can no longer retire off individuals on the basis of age alone, or refuse to hire them. Exceptions to this are made where mandatory retirement is allowable for reasons of safety, notably in the case of airline pilots, firefighters and law enforcement officers (Macnicol 2006: 237). In addition, mandatory retirement is allowed in small firms with fewer than 20 staff, although this exemption is prohibited in a number of states. Finally, so-called bona fide executives and people in high-level policymaking positions can be compulsorily retired if they are over 65 and entitled to annual retirement benefits of at least \$44,000 (Macnicol 2006).

Measuring the impact of abolishing mandatory retirement is not entirely straightforward, because the changes occurred in the context of declining employment among older people (Lain 2011). The important question, therefore, is what would have happened in the absence of legislation. In order to examine this, researchers have exploited the fact that some states protected people over age 65 from age discrimination earlier than others. A key paper by Adams (2004) found that employment beyond age 65 was higher in states where these individuals were protected from mandatory retirement. Adams

(2004: 204) concludes that 'age discrimination legislation has succeeded in boosting the employment of older individuals through allowing them to remain in the workforce longer'. The evidence presented suggests that the increased likelihood of working past 65 was due to people *continuing* in jobs they already held, rather than being recruited to new jobs. Indeed, Adams found some evidence of lower recruitment of over-65s in states where they were protected from age discrimination. This has led some to argue that mandatory retirement restrictions harm older workers by making employers reluctant to recruit them (Heywood and Siebert 2008). In reality, recruitment levels of older people in the USA appear to be relatively high in terms of people moving into bridge jobs or returning to work after retirement (see Lain and Vickerstaff 2014 for a discussion). The number of Americans moving into new jobs in older age also appears to be increasing (Giandrea et al. 2009). We should therefore be wary of assuming that countries abolishing mandatory retirement will see a reduction in the recruitment of older people. At the same time, however, we should recognise that the main consequence of abolishing mandatory retirement is likely to be increased 'staying on rates' for those in long-held jobs.

The UK followed New Zealand, Australia and Canada in abolishing mandatory retirement in most circumstances in 2011. This built on UK age legislation, introduced in 2006, that protected individuals from age discrimination up to the age of 65 and gave them the right to request continued employment beyond this 'default retirement age'. Although employers had the right to reject requests for continued employment between 2006 and 2011, there is evidence that this change opened up opportunities for those aged over 65 to a degree. Quantitative and case study research by Parry and Tyson (2009) found that employers were introducing age discrimination policies in this legislative context; this is attributed to employers mimicking the practices of other firms in times of legal uncertainty. The 2011 reform abolished mandatory retirement except where the employer could provide a legitimate 'Employer Justified Retirement Age' (EJRA). To be legally acceptable, the justification had to be a 'proportionate means' of achieving a 'legitimate end'; this 'legitimate end' had to have a positive social policy objective that was in the public interest (see Lain *forthcoming*). The Universities of Oxford and Cambridge are high-profile employers with EJRAs that cover academic staff; they cite 'intergenerational fairness' and the promotion of diversity among their justifications. The diversity argument rests on the fact that recruits are likely to be more diverse than those potentially remaining in work. The University and College Union for academic staff opposed the retention of a mandatory

retirement age, although at a local level, the views among academics appear to be mixed on this issue (Flynn 2014: 32).

While employers can attempt to justify mandatory retirement ages, there is little evidence that many employers will follow this path. Historically, large employers in the private and public sectors have been most likely to have mandatory retirement clauses in contracts (Metcalf and Meadows 2006). It is therefore interesting to note the results of a survey of 300 members of the Confederation of British Industry (CBI 2013), a membership organisation comprised primarily large employers. This survey found that only around 5 per cent of employers surveyed had retained a mandatory retirement age; around a third said they would like to use a compulsory retirement age but saw this as too risky, given legal uncertainty. This suggests that mandatory retirement ages have been marginalised considerably since the early 2000s.

Restrictions on mandatory retirement ages are therefore likely to benefit workers that formerly had compulsory retirement ages in their contracts. However, the legislation is likely to more generally reduce employer discretion over deciding who can continue working beyond age 65. In the past, employees *without* mandatory retirement ages in their contracts could not automatically assume that they could work past 65. Employment rights, such as the right to claim unfair dismissal or redundancy payments, ended at 65 irrespective of what was in the employment contract (Lain 2011). In this context, managers appear to have been important in deciding who could continue working beyond age 65 (Vickerstaff 2006). The legislative changes have therefore significantly increased the ability of employees to remain in work beyond age 65, with consequences for age diversity in the workplaces.

Changing Employment Beyond Age 65: The Case of the UK

Given the legislative changes that have occurred in the UK, we now turn to examine how employment past age 65 has changed; this will allow us to consider the implications of these changes for managing age-diverse workforces. We examine employment at age 65–69 at three time periods:

- The early 2000s (2001), when employers had an almost complete free hand in making decisions about employment beyond age 65;

- The late 2000s (2008), after the 2006 right to request continued employment beyond age 65; and
- 2014, three years after the 2011 legislation restricting mandatory retirement.

The UK Labour Force Survey (LFS) July to September quarterly files were analysed for each of the three years. The LFS is a large-scale population survey with relatively big samples of employees aged 65–69; 477 workers of this age group were interviewed in the 2001 survey, 655 in the 2008 survey and 867 in the 2014 survey. The LFS also contains data on the occupation of the individual, their sector of employment and the size of their workplace.

Figure 19.2 tracks the extent of the increase in employment between 2001 and 2014. During this period, the proportion of people aged 65–69 working almost doubled, rising from 11.2 per cent in 2001 to 16.3 per cent in 2008 and to 20.2 per cent in 2014. Figure 19.2 breaks down the results by whether workers were employees or self-employed. Figure 19.2 shows that in all time periods, employees were the majority group. Employment rose for both employees and the self-employed during this period; 7.5 per cent of people aged 65–69 were employees in 2001, rising to 11.3 per cent in 2008 and 13.3 per cent in 2014. Each of these employment increases were statistically significant (supplementary analysis, not shown). In the UK context, therefore, we see a sustained increase in people working as employees

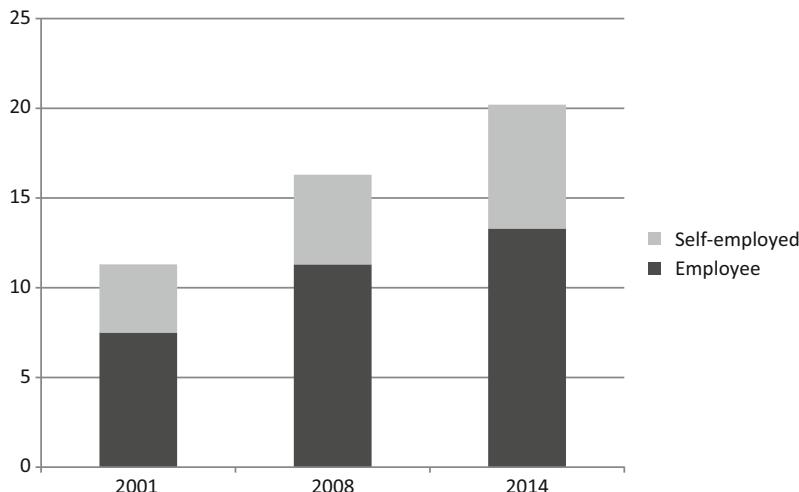


Fig. 19.2 Percentages working at ages 65–69 broken down by employment status (Source: Author's analysis of the July–September Labour Force Surveys 2001, 2008 and 2014)

past age 65. For the rest of the analysis, we focus on the dominant group, employees, given their importance for organisational age diversity.

The second aspect of interest is whether employees aged 65–69 are integrated into organisations through long-term employment relationships. Lain (2012) found that in the early 2000s, almost half of the employees aged 65–69 had started their job relatively recently, while they were in their 60s. This is perhaps not surprising, given the limited opportunities to continue working past age 65 at this time. Some, such as Standing (2011), have suggested that people are returning to work in precarious marginal jobs following retirement because of financial pressures. Clearly, the extent to which over-65s are integrated into organisations depends upon whether they are long-term employees or recent recruits in marginal jobs. Figure 19.3 presents the proportion of people aged 65–69 working as employees in each period, broken down by employment tenure. This shows that the rise in employment for this age group can mostly be explained by people in long-term jobs working past age 65 in greater numbers. In 2001, just 3.39 per cent of those aged 65–69 were working in employee jobs that they had started in the last five years; this represented around half of the 7.5 per cent working as employees at this time. In 2008 and 2014, we see, once again, that around 3 per cent of people in this age group were in jobs that had begun in the last five years. There was some increase in employment between 2001 and 2008 for those in jobs that had begun in the last 5–10 years. More generally, however, the increase in

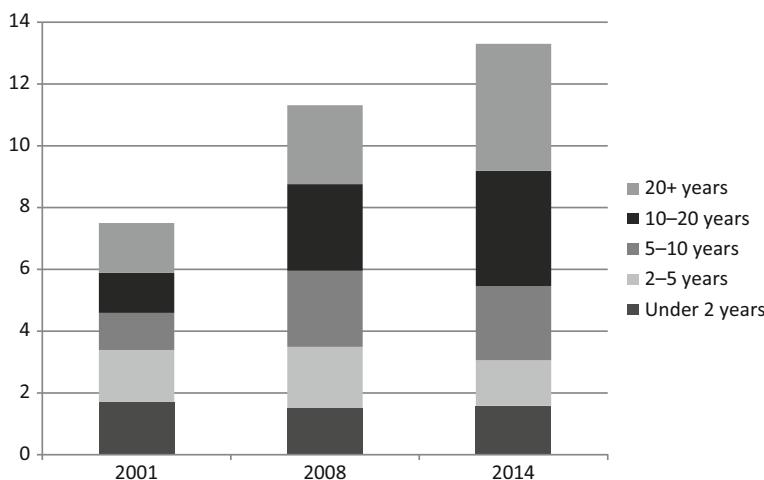


Fig. 19.3 Percentages working as employees at age 65–69 broken down by employment tenure (Source: Author's analysis of the July–September Labour Force Surveys 2001, 2008 and 2014)

employment can be explained by the rising number of people in jobs lasting 10+ years staying on in work. Between 2008 and 2014, all of the employment increase could be explained by this continuation in long-held jobs. This is as we would expect, given restrictions on the use of mandatory retirement by employers. During this period, the proportion of employees aged 65–69 on temporary contracts also fell from 18 per cent in 2001 to 11.5 per cent in 2014 (a statistically significant change at the 5 per cent level; supplementary analysis not shown).

Given the increase in long-term employees staying on, it is important to examine the jobs these individuals do. Lain's (2012) examination of the early 2000s suggested that over-65s were disproportionately concentrated in 'Lopaq' jobs; these were typically low paid part-time jobs with low qualification requirements. These jobs included shop sales workers and cashiers, waiters, bar staff, food preparers, cleaners, domestic helpers, home care workers ('home help') and caretakers among others. The explanation given was that the characteristics of these jobs made them less desirable to the 'core-age' workforce. Very young workers (under 25) were often employed in these low-paid jobs because they combined employment with studying or living with parents. Employees in their 60s upwards were an attractive alternative group in this context, however, because of their maturity, experience and perceived customer service skills. The receipt of a state pension also meant that these individuals were often in a financial position to take these low-paying jobs. Managers were therefore happy to recruit people in their 60s to Lopaq roles, or to allow people already in these jobs to continue working. Lain (2012) suggested that age discrimination legislation, and the abolition of mandatory retirement, would reduce this concentration in Lopaq jobs to a degree. It would do this by enhancing opportunities for individuals across a range of occupational groups to continue in employment past age 65.

Table 19.1 breaks down employment by occupation for different age groups: 16–24, 25–49, 50–59, 60–64 and 65–69. For reasons of space, we only present results for the beginning and end of the period, in 2001 and 2014. We designate the 'core-age' workforce as being aged 25–49. Sixteen-twenty-four-year-olds are excluded from this core-age group because they are entering employment for the first time, sometimes during periods of study, and are often establishing themselves in work. Following previous research, those over age 50 are categorised as being 'older' than in the 'core-age' workforce, based on evidence of employer attitudes towards people of this age (see, e.g., Loretto and White 2006). Nevertheless, we separate out people aged 50–59 and 60–64 because we expect employers to treat the younger group differently to a degree, because they are further away from typical retirement

Table 19.1 Percentages of employees working in different occupations, sectors and workplace sizes, broken down by age group

	2001						2014					
	16-24	25-49	50-59	60-64	65-69		16-24	25-49	50-59	60-64	65-69	
Occupation												
Managers etc	17.7*	44.0	37.5*	27.9*	24.0*		19.7*	49.5	44.2*	37.1*	34.8*	
Crafts	10.6*	9.3	8.9	11.3*	7.5	9.3*	7.9	7.7	9.5	7.6	7.6	
Operatives	6.0*	8.6	10.0*	12.3*	8.3	3.5*	5.8	7.7*	9.2*	8.8*		
Clerks	14.9	14.3	16.5*	14.1	16.2	10.6*	11.1	14.0*	14.7*	18.6*		
Lopaq occs	50.7*	23.7	27.0*	34.4*	44.0*	56.8*	25.8	26.4	29.6*	30.1*		
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Sector												
Manufacturing	13.4*	18.0	18.9	18.8	16.8	7.7*	11.8	12.7	12.5	8.9		
Other goods	7.8	7.5	7.4	9.1	5.7	7.0	7.1	7.2	6.8	6.5		
Retail etc	38.0*	16.4	14.6	16.8	24.6*	41.1*	17.0	14.4	17.2	17.2		
Transport	5.0*	7.7	7.4	7.6	4.2*	2.7*	6.2	6.8	6.8	5.8		
Financial	15.5	16.8	11.9*	11.5*	13.4	13.5*	19.3	14.5*	14.4*	16.9		
Public administration	3.6*	8.3	8.6	5.8	5.0	3.0*	7.5	8.3	6.0	6.1		
Education	3.0	8.7	12.0	10.2	9.3	5.7*	11.6	13.7*	12.9	13.7		
Health and social	6.6	12.1	14.5*	13.8	11.9	10.9*	14.6	17.9*	16.9	18.1		
Other services	7.2*	4.5	4.7	6.4*	9.0*	8.3*	4.8	4.5	6.4	6.7		
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Work size												
1-10	20.8*	16.4	18.2*	22.7*	35.9*	22.9*	17.3	19.0*	22.1*	30.7*		
11-24	19.1*	14.3	15.1	16.4	17.6	22.7*	13.5	13.0	12.7	14.0		
25-49	12.9	12.0	12.8	13.6	12.9	14.2	12.9	13.3	13.6	11.4		
50+	47.2*	57.3	53.9*	47.3*	33.6*	40.1*	56.3	54.7	51.6*	43.8*		
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Unweighted Base	7933	33552	10314	1970	477	4540	23049	8467	2286	867		

Note: *A significant difference from the 'core-age' workforce group aged 25-49 at the p < 0.05 level

Source: Author's analysis of the July-September Labour Force Surveys 2001, 2008 and 2014

age. Table 19.1 shows whether there are statistically significant occupational differences between the core-age workforce and other age groups. To identify Lopaq occupations, we recoded the LFS occupational classifications SOC 2000 and SOC 2010 to combine Personal Service, Sales/Customer Service and Elementary occupations. We had to merge managers, professionals and associate professionals into a single category, because the individual categories were not comparable over time due to the change from SOC 2000 to SOC 2010 over the period. This is unfortunate, because we might expect employment differences between managers, who have firm specific skills, and professionals that have occupationally specific skills (Crompton 2001).

Table 19.1 shows the extent to which employees over age 65 were concentrated in Lopaq jobs in 2001. In 2001, 44 per cent of those aged 65–69 were in Lopaq occupations, compared with only 23.7 per cent of those aged 25–49. Previous research suggests that this was not just a ‘cohort effect’ in which employment for this five-year age cohort had always been dominated by Lopaq jobs (Lain 2012). The big jump in Lopaq employment between ages 60–64 and 65–69 also supports the argument that employment of over-65s was being disproportionately confined to Lopaq occupations. In 2014, those aged 65–69 were still significantly more likely to be in Lopaq jobs than those aged 25–49. However, the difference between the age groups was much narrower in 2014: 30.1 per cent of those aged 65–69 were in Lopaq jobs compared with 25.8 per cent of those aged 25–49. At the other end of the occupational spectrum, we see a relative increase in the proportion of over-65s working in managerial/professional/associate professional jobs. In 2001, a quarter of employees aged 65–69 were in this upper-level category, compared with a third in 2014. There may be some cohort effect operating here to a degree, with the earlier cohort of 65–69-year-olds being less likely to work to be in these upper-level occupations at younger ages. However, it does suggest that over-65s are being more integrated into employment across occupational groups.

Table 19.1 also shows employment broken down by sector; this indicates that over-65s have become less concentrated in particular sectors in which Lopaq jobs are common. In 2001, a quarter of employees aged 65–69 worked in the ‘retail etc’ sector, compared with only one-sixth of people aged 25–49. This sector combines retail, hotels and restaurants and consequently contains a significant number of people in Lopaq occupations. During this time, large retailers, such as the DIY chain B&Q, became known in the press as significant employers of older people (Lain 2012). By 2014, this over-representation in retail was gone. Likewise, there was a significant over-representation of employees aged 65–69 in ‘other services’ in 2001; 9 per cent worked in this

sector compared with 4.5 per cent of those aged 25–49. ‘Other services’ includes a number of other lower-level service roles related to housekeeping and recreation/leisure. By 2014, this over-representation in ‘other services’ was also gone. Indeed, in 2014, there were no significant sectoral employment differences between employees aged 65–69 and those aged 25–49. This is as we might expect, given the restrictions on mandatory retirement placed on employers across all sectors.

Finally, Table 19.1 breaks down employment by workplace size. Previous research suggests that workers over state pension age have been disproportionately employed by small employers in the past (Smeaton and McKay 2003; Cebulla et al. 2007). Small employers have been less likely to have mandatory retirement ages. It has also been suggested small employers are less bureaucratic and rule-bound, and have therefore found it easier to accommodate requests for continued employment beyond age 65 (Cebulla et al. 2007). In the context of mandatory retirement abolition, we would expect this disproportionate concentration in small employers to weaken. Unfortunately, the LFS does not collect data on the size of employer, which is why we focus on workplace size. Clearly, employers may have a large number of staff spread across a number of small workplaces. From Table 19.1, we can, however, see how many individuals are in workplaces with more than 50 employees; by default, we know that these individuals are not working for the smallest employers. Table 19.1 shows that the proportion of those aged 65–69 in these ‘larger’ workplaces did rise over this period. In 2001, 33.6 per cent of these older workers were in workplaces with the least 50 staff; by 2014, this had risen to 43.8 per cent. This was still below the percentages of those aged 25–49 working in these larger workplaces at both periods; in 2001, 57.3 per cent of those aged 25–49 were in workplaces with 50+ staff, almost exactly the same percentage as in 2014 (56.3 per cent). Nevertheless, these results are consistent with increasing integration of employees aged 65–69 into larger employers. This has occurred alongside a greater integration of this age group across occupational groups and sectors of employment. These changes have important implications for managing age-diverse workforces, which we consider in the concluding discussion.

Discussion

In recent years, there has been increased discussion about ‘multigenerational’ workforces and increasing age diversity at work. To a degree, this reflects a break with the recent past, when older workers in many OECD countries had

become increasingly marginalised (Ebbinghaus 2006). Since the early 2000s, we have seen an increase in employment beyond age 65 in most OECD countries, although the extent to which this has occurred has varied. By 2013, the UK was among the English-speaking countries that had experienced a significant increase in the number of employees aged over 65. In order to understand these changes, the chapter has focused on two areas of policy that contributed to these employment rises. First, changes to pensions have made employment beyond age 65 both more attractive in countries like the UK and USA. In particular, it has become easier to combine pension income with earnings, meaning that people no longer have to leave employment to receive a full pension. Second, in the UK, USA, Australia and Canada, restrictions have been placed on the ability of employers to use mandatory retirement ages. In the USA, this is not a recent development, as mandatory retirement was abolished in the mid-1980s. However, in the other English-speaking countries, this change has occurred since the early 2000s or thereabouts, a period in which employment rose considerably in these countries. Evidence from the USA suggests that the main consequence of abolishing mandatory retirement was to increase the number of individuals continuing in their jobs beyond age 65.

In order to better understand increases in employment beyond 65 in the UK, we presented analysis of the UK LFS. Employment among those aged 65–69 almost doubled between 2001 and 2014 in percentage terms. The majority of these workers were employees rather than self-employed, so the increase in employment has relevance for age diversity within organisations. The increase in the number of employees working in this age band was primarily due to those in long-held jobs, lasting ten or more years, continuing in employment. This is as we would expect, given the introduction of restrictions on the use of mandatory retirement. In the early 2000s, we saw over-65s disproportionately segregated into Lopaq occupations, that were low paid, typically part-time and required few qualifications. By 2014, the percentages in these occupations was close to that of the ‘core-age’ workforce aged 25–49. We also see that in 2014, over-65s were no longer disproportionately concentrated in sectors such as retail that include a lot of ‘Lopaq’ occupations. Indeed, by 2014, the sectoral composition of employment beyond age 65 was not significantly different from that of 25–49-year-olds. Likewise, we see some evidence of over-65s also being integrated into larger workplaces.

Over-65s have therefore become much more integrated in UK workplaces since the early 2000s. By continuing in employment in greater numbers, their presence across different occupational groups, sectors of employment

and workplace sizes has increased. Increases in employment have occurred during a period that includes the most severe recession of the post-war period. We should expect this trend of increasing employment beyond age 65 to continue, given pension age increases and the abolition of mandatory retirement.

The increased presence of over-65s in organisational life has important implications. In countries such as the UK, employers in the past could easily retire off workers at 65, irrespective of whether the individual had a compulsory retirement age in their employment contract. With the abolition of mandatory retirement ages, there is no obvious fixed end point to employment. The challenge will therefore be to manage long-term workers when there are few age-based markers for how long they will be there. This has undoubtedly caused anxiety on the part of employers, with a third of surveyed organisations stating that they would like to use mandatory retirement ages if they could (CBI 2013). However, the integration of over-65s into the workplace brings advantages, if it is managed effectively.

From an age-diversity perspective, the inclusion of over-65s in the workplace can be a real advantage in terms of the experience it brings to the organisation. The case of nursing shows that older workers can make valuable contributions through mentoring younger colleagues and being involved in knowledge transfer activities (Moseley et al. 2008). More generally, the integration of workers over 65 across different occupations provides opportunities to benefit from years of accumulated experience. In this regard, however, there has to be a willingness to listen to experience that is shared, rather than simply labelling some of the critical perspectives of older people as simply being resistant to change.

The second implication is the need for effective performance management systems. In the past, it was often assumed that as older workers would be out by 65 at the latest, there was little to be gained from attempting to manage their performance. This might also be considered a more humane approach because older workers were not subject to intense monitoring in their final years of employment. However, this disengagement with older workers could result in individuals feeling under-appreciated, under-invested in, and ready to go at 65 or earlier. Now that the remaining period of employment is less predictable, effective performance management systems are even more important (CIPD 2011). This is not just a case of monitoring employment so that underperforming individuals can be identified and retired off. Instead, performance management processes can have a positive effect on motivation, if the goals of older workers are regularly reviewed and developmental and training opportunities are provided.

Finally, and related to the last point, the end of mandatory retirement ages means that the pathways out of work and into retirement may become more varied. People still working in their 60s are likely to have a range of competing calls on their time, including caring responsibilities for elderly parents or grandchildren and the desire for more leisure time (Vickerstaff et al. 2008). In this context, part-time and flexible working is popular among many older people. In order to ensure older staff members remain committed to employment, it may therefore become increasingly important to provide individualised work arrangements that suit the needs and desires of workers. Research from the Netherlands indicates that individually negotiated ‘idiosyncratic deals’, or ‘Ideals’, can motivate staff to work past age 65 (Bal et al. 2012). These deals aim to provide working arrangements that fit with the lives of employees that would otherwise be retired. As the numbers of over-65s rises, such individual arrangements may become more common within workplaces. On the other hand, the abolition of mandatory retirement may simply result in people working in their jobs a few more years, with few adjustments made to working hours or job roles (see Lain and Loretto 2016). How late career transitions are played out, and managed, in organisations is therefore a vital area for future research. In relation to UK policy, reforms to mandatory retirement and pensions are likely to increase employment beyond age 65. However, priorities for the future include policies that promote lifelong learning and acknowledge the work-related health limitations faced by many older people (see Lain and Loretto 2016).

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20

The Impact of National Context on Age Diversity and Age Management: The Case of the UK and Hong Kong

Matt Flynn, Heike Simone Schröder, and Alfred C.M. Chan

Demographic Change: A Challenge for Both Eastern and Western Economies

This chapter explores how governments are responding to ageing demographics using two case studies: the UK and Hong Kong. Both economies are facing dual challenges: addressing chronic skills shortages which necessitate longer working lives and closing the gap in pension savings as citizens need to prepare for longer periods of old age. We will explore how governments in these contrasting economies are using both the levers of the welfare state and employment law to shape employment and savings patterns. Although the timing may differ, the two governments are following similar tracks of placing the onus for both extended working life and savings on individuals while not significantly intervening in firms' business and Human Resource (HR) processes. The most significant difference between the two governments' responses

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to ageing demographics lies in how they have been tackling workplace ageism since the beginning of the millennium. While the Hong Kong government focused its efforts on encouraging voluntary good practice by businesses, in the UK, regulations are now in place to curtail both workplace age discrimination and mandatory retirement. However, the latter interventions are directly in response to the European Union (EU)'s Lisbon Protocol, which directed member states to take action to raise participation rates of people aged 55–64.

It is widely recognised that demographic change will lead to a shift in the global age structure and to a significant population ageing in most countries, regardless of geographic location (Kulik et al. 2014). In fact, the 2005 United Nations (UN) World Population Aging Report suggests that populations are getting older in all but 18 countries worldwide (in the majority sub-Saharan Africa) (Chand and Tung 2014) and the 2013 UN World Population Ageing Report hypothesises that population ageing will also increasingly affect the less and least developed regions of the world (UN 2013). As discussed in greater detail in the introduction of this volume, population ageing is estimated to be a practically universal phenomenon during the twenty-first century, even though it will affect different regions with different speed and intensity (UN 2013).

As a consequence, population ageing is expected to cause significant economic and societal challenges but also opportunities for states and organisations throughout the world (Harper 2014). For states, challenges include implications for:

1. the size of national labour markets, the degree of labour productivity and the availability of sufficient amounts of skilled labour (Lisenkova et al. 2013);
2. patterns of individual consumption and savings (Bloom et al. 2010; Hock and Weil 2012);
3. the long-term sustainability of national-level welfare state policies including pension and healthcare systems (Bloom et al. 2015; Walker and Maltby 2012).

Similarly, population ageing might force organisations to adapt their Human Resource Management (HRM) policies and practices in order to:

1. address changes to the age composition as well as increasing (age) diversity (Williams and O'Reilly 1998);
2. combat age discrimination as it might negatively influence organisational performance (Kunze et al. 2011);
3. deal with a lack of qualified job applicants due to skill shortages (Connell and Stanton 2014);

4. achieve the retention of older employees (Midtsundstad 2011) and to maintain their employability through skills updating throughout the life course (Raemdonck et al. 2015); as well as
5. adopt long-term and positive HRM strategies, particularly focused on health, learning and career development (Taylor and Walker 1998; Naegle and Walker 2006).

While most countries experience these challenges, they might do so to different degrees, depending on the national context, or national design of the economy, labour market and welfare state (Boehm et al. 2013). In coordinated market economies (i.e. those defined by Hall and Soskice (2001) as relying on formal institutions like unions and business organisations to coordinate the interaction of firms), government will take an intervening role in shaping HRM policies on age and work. In contrast, liberal market economies (i.e. those states defined by Hall and Soskice (2001) as mostly not intervening in business processes) will maintain a “hands off” approach to manage an ageing workforce.

Differences between these two clusters might be explained as reflective of different institutional systems and a “path dependent” approach (i.e. the specific paths of policy development based on the country’s history and institutions) to understand how employers respond to ageing demographics. However, even in two economies which share features of their business systems and welfare states like the UK and Hong Kong (representatives of the liberal market economy cluster and the focus of this chapter), differences in labour force participation are apparent. As Fig. 20.1 shows, male participation rates between the two economies is equivalent (with Hong Kong participation

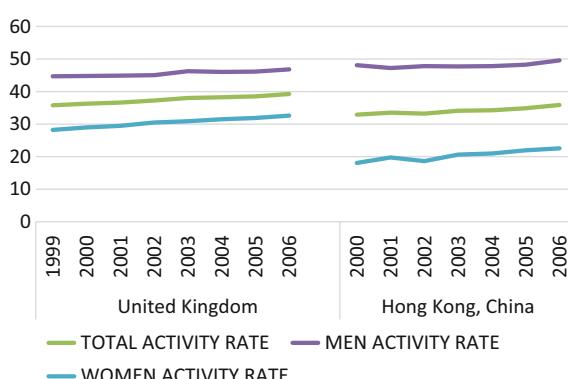


Fig. 20.1 Labour market participation rates in the UK and Hong Kong by gender (Figures from UK Labour Force Survey Q4 2013 and Quarterly Report on General Household Survey Oct–Dec 2013)

rates slightly higher). However, female participation rates in Hong Kong are roughly half of the UK's. While male participation rates are largely equivalent, there are some significant differences within the profiles. For example, men in the UK who are over 60 and in work are more than twice as likely to be in self-employment than their Hong Kong equivalents (39 per cent vs. 16 per cent) (HK Labour Department 2012).

Not only are the two economies facing ageing populations but demographic change is also resulting in significant skills and labour shortages. According to the UN, the 60-plus populations are set to increase by 50 per cent in the UK and 250 per cent in Hong Kong between 2000 and 2025. In Hong Kong, manpower projections to 2018 mean an extra 320,000 workers will be required over the next four years, but there will only be an increase of 290,000 people in the same period (Census and Statistics Department 2011). In the UK, according to the UK Commission on Employment and Skills (2011), over the next decade, 13.5 million vacancies will open up, but only seven million school leavers will be available to fill them.

The remainder of this chapter discusses how such national differences (and possibly similarities) come about and how different international as well as national pressures influence: (1) saving patterns through the regulation of second-tier pensions, (2) the labour market participation of older workers, as well as (3) HR policies and practices with regard to the employment of this age group.

Factors Influencing the Labour Force Participation and Management of an Ageing Workforce

Institutional theory is used in International and Comparative HRM research to identify and explain differences in organisational policies across countries (Hall and Wailes 2009). It stipulates that nation-specific institutions, such as rules, laws and conventions, influence how organisations design HRM policies (Hall and Soskice 2001) and suggests that nation-specific configurations of institutions lead to an equally nation-specific design of organisational policies and strategies (McGaughey and De Cieri 1999). Indeed, research has found differences between national institutional contexts (Mayer and Whittington 2004) that, as a consequence, lead to variations in HRM practices (Bowen et al. 2002; Kostova et al. 2008). With regard to age management, Ebbinghaus (2006) found that different countries experience different kinds of retirement outcomes, ranging from early retirement to extended working life, despite similar global change pressures such as demographic change.

This suggests that different countries react differently to the challenges posed by demographic change, and hence, implement and use different kinds of institutions to different degrees to manage this challenge. These institutions include the welfare and pension system; state- or firm-financed early retirement pathways; employment relations as well as the structure (internal vs. external) and role (active vs. passive) of the labour market (Blossfeld et al. 2006; Hofäcker and Pollnerová 2006). This also includes the role of the state in influencing firm policies (interventionist vs. non-interventionist) (Hall and Soskice 2001) as well as the education system and whether there is general access to lifelong learning in later life (Taylor et al. 2010).

In fact, there have been many attempts to identify clusters of countries that have similar kinds of economic and political institutions, causing similar effects. Categorisations are made, for example, in the “Varieties of Capitalism” (VoC) (Hall and Soskice 2001), welfare state (Esping-Andersen 1990) and “National Business Systems” (Whitley 1999) literatures to show how resource allocation, de-commodification of social goods and the role of government in managing the economy, respectively, shape HR policies with regard to age. There are three reasons why cross-comparative studies on age are worthwhile:

1. Although populations are ageing across most of the world, the pace of ageing differs from country to country. Other than Japan and South Korea, all of the top 20 oldest countries are in Europe as measured as the proportion of the population over 60. However, reflecting high longevity and a cluster of very old people at the top of the age pyramid, Hong Kong has the ninth highest median age surpassing that of the UK (UN 2013). The pressures employers face to respond to changing age demographics such as dwindling supply of school leavers, increased demand for flexible working arrangements for workers with eldercare responsibilities, and changing retirement patterns reflect the cultural and regulatory contexts of the countries within which workplaces are located.
2. National institutional “stakeholders” beyond the state play a significant role in shaping how government and employers manage age. Business organisations and trade unions have been shown to play a significant role in embedding an early retirement culture in most parts of Europe (Ebbinghaus 2006) as well as transitioning to an active ageing paradigm (Flynn et al. 2013). How such stakeholders respond to ageing therefore reflects the wider consensus within nation states on how to manage changing age demographics.
3. There has been a dearth of literature on how stakeholders in economies outside of Europe, Japan and North America are responding to age. In

particular, all of the Tiger economies are within the top 20 per cent of ageing populations. How productivist welfare states (i.e. those which place a large emphasis on personal savings and have low replacement rates) respond to ageing demographics is important and distinct from the pathways set by Western economies.

With respect to demographic change and age management, Hofäcker and Pollnerová (2006) have attempted to cluster countries according to their institutions and whether they support or hinder proactive age management, using the welfare state framework by Esping-Andersen (1990). For example, Hofäcker and Pollnerová (2006) found that countries that provide low welfare incentives for early retirement, such as social democratic and liberal countries (such as Sweden and the UK), have a relatively high labour market participation of older workers. In contrast, countries with strong (state-financed) early exit options and welfare subsidies, such as conservative welfare states, including Germany and Italy, show lower labour market participation rates. The productivist welfare states which are prevalent among the Asian “tiger” economies feature minimal de-commodification of old-age welfare, and therefore few early exit options provided directly by the state (Holliday 2000). However, there is a great amount of divergence within Asia in terms of government intervention to promote older workers’ employability. Unlike Japan, as mentioned above, Hong Kong and Taiwan feature no government interventions beyond voluntary codes of practices meant to encourage employers to delay retirement of employees (Doling et al. 2005).

Furthermore, the high degree of employment regulation normally found in conservative welfare states leads to lower labour market participation rates, while the less stringent employment protection in liberal and productivist welfare states provide few (and sometimes no) inducements for older workers to be “pulled” into early retirement although may provide some “stay” factor inducements such as augmented pensions for those who delay drawing their pensions. Similarly, countries that implement active labour market policies towards the employment of older workers, such as the social democratic welfare states Denmark and Sweden, tend to show higher employment rates among the age group of 50 and above. Nevertheless, even though liberal welfare states, including the UK, do not invest significant funds into active labour market policies, they have a similar employment rate in this age group and the highest rates of participation of those aged over 65 years. This is because the simultaneous lack of social welfare provisions forces unemployed individuals back into the labour market (Hofäcker and Pollnerová 2006). Therefore, it is expected that firms in coordinated market economies, such as Germany,

display different organisational approaches towards older employees than do firms in liberal market economies, such as the UK (Schröder et al. 2009). As a consequence, workers aged over 50 tend to have higher employment opportunities in the UK than in Germany, though mediated by gender and initial educational level (Hofacker et al. 2016).

However, this theoretical clustering based on political and economic indicators does not overlook the similarities between different clusters or difference within the same cluster with regard to age management approaches. Lain (2012), for example, suggests that age management approaches might differ between similar Varieties of Capitalism regimes. He found that national policies towards working past retirement, including the existence of a default retirement age (DRA), influence work opportunities for those aged over 65 in the UK and the USA. Even though both countries are considered “liberal market economies,” the existence of a DRA has resulted in fewer qualified work opportunities for those past retirement age in the UK in comparison to the USA, where anti-age discrimination legislation has prohibited employers from automatically retiring employees when they reach pension age. Similarly, Schröder et al. (2014) suggest that firms across different Varieties of Capitalism clusters might display similar approaches towards the management of their ageing workforce, as seen in two case studies of retail firms in Germany and the UK. This indicates that (some) institutional contexts might provide individuals (or employers) with space to manoeuvre (Almond et al. 2005).

Also, the national institutional context is not considered to be stable but changing over time (Dacin et al. 2002). For example, the process of globalisation caused a tertiarisation of the economy in industrialised countries (Castells 2000). As a consequence, traditional industries, such as steel, mining and shipbuilding, in which older workers are over-proportionally employed, are either in decline or production is shifted to low-labour-cost countries (Buchholz et al. 2006). Hence, work opportunities for older workers in such industries in industrialised countries are decreasingly available. Furthermore, alternative employment options might not be readily available as older workers might not (yet) possess relevant technological skills (Buchholz et al. 2006) and might, hence, no longer be considered employable (Loretto and White 2006). Such processes might, in turn, lead to changes to existing institutions as well as to the establishment of new institutions. An example is the abolition of the DRA in the UK and the increasingly proactive role of the state in influencing firm-level age management in Japan (Flynn et al. 2014) as well as the institutionalisation of new actors in influencing firm-level responses to an ageing workforce in both the UK and Germany (Muller-Camen et al. 2011). As a result of changes to institutions such as welfare, pension and labour market

systems, employers and other actors are then similarly expected to adjust their approaches to firm-level age management approaches, as shown in the case of German and British trade unions (Flynn et al. 2013). Thus, there is a significant and not yet reconciled debate about whether ageing demographics are creating convergent or divergent pressures in relation to employment regulations and welfare policies. On the one hand, governments in developed economies are facing similar pressures to both maintain labour force participation rates and ensure the viability of their respective welfare states. On the other hand, government responses reflect patterns that are reflective of the depth of intervention they can make in businesses' HRM policies with regulatory states mainly limiting government intervention to levelling the playing field of the labour market and developmentalist economies allowing more direct carrot and stick interventions in business practices (Flynn et al. 2014).

Age Diversity in the UK and Hong Kong

In this section, we discuss the impact that changes in the global economic and political environment are having on both public and HR policies in two economies. The two economies we are discussing are those of the UK and Hong Kong. The analysis is based on a systematic review of academic, legal, public policy and practitioner literature on ageing, employment and retirement in these two countries.

Both economies are experiencing ageing populations. Those over the age of 55 represent 27.8 and 28.3 per cent of the population, respectively. Further, because Hong Kong is a former British colony, the two economies feature a number of institutional similarities including regulatory business systems, limited welfare provision, short-term employment relationships and the dominance of small businesses (Witt and Redding 2013). However, Hong Kong diverges from the UK in terms of the importance of intergenerational social relationships which constrain older workers' choices. Chiu et al. (2001) point to negative stereotypes against older workers in Hong Kong as well as the stigma attached to extended working life. Although ageism shapes older workers' choices as well, employers also have positive views of older workers such as showing greater loyalty to their employers and having valuable experience (Carnegie Trust 1996). Older workers in the UK and Hong Kong have low levels of job security relative to those in continental Europe, but have more opportunities to move between employers throughout their working lives, as well as to continue in work past the age of 65 on a portfolio or consultancy basis (Chan 1998).

We therefore explore how Hong Kong and the UK are responding to ageing demographics, identifying similar patterns in the two economies. We do so by focusing on two broad areas of government action: welfare provision and ensuring universal pension coverage (in which the UK is now following a path set by Hong Kong from 1995); and promoting age diversity to private sector employers (in which UK public policy is more advanced having circumscribed workplace age discrimination and mandatory retirement). The argument of this chapter is that in both economies, governments are placing responsibility for both retirement savings and extended working life on the employee rather than employer. While the UK government has introduced regulations prohibiting age discrimination as well as abolition of mandatory retirement, these are mainly as a response to pressure from the EU to raise real retirement ages.

Both economies feature residual welfare states in which the state only intervenes when provision via the private market and the family have failed. In the case of the UK, the Beveridgean welfare state is categorised as a basic security model in which citizenship is the basis of entitlement for a “flat-rate” pension within a system which brings about a modest amount of redistribution (Cremer and Pestieau 2003). Social welfare is primarily provided directly by the state and paid for by social insurance contributions. Hong Kong is also a residual welfare state in which social welfare is set at low levels with the expressed aim of maintaining personal and family provision as the primary means of social support (Chan 1998). Welfare provision is paid for by the state but delivered through non-governmental organisations and charities organised through the National Council of Social Services.

The first tier of the UK pension is a universal pension set at GBP 113.10 per week as of 2015 as a basic for a single person. Qualification for the full state pension is dependent on 30 years of contribution into the National Insurance system,¹ although periods of non-work for unemployment or caring responsibilities are credited for eligibility. A means-tested pension credit is paid to older people who have no other means of income to provide a minimum pension guarantee of GBP 151.20 per week (about \$650 per month) for a single person. The pension age for men is 65, and for women, between 2010 and 2018, is rising from 60 to 65. From 2018, pension ages for both men and women will rise first to 66 by 2020, then to 67 by 2028 and to 68 by the mid-2030s. The UK Her Majesty’s Treasury expects further rises to be linked to life expectancy.

The first-tier pension in Hong Kong is considerably less generous in terms of both benefits paid and timing when it starts. The Old Age Allowance is a

¹The UK National Insurance system of contribution is paid for by employers and workers to fund social benefits such as the state pension.

universal social benefit for people 70 years and over, and a means-tested Old Age Living Allowance for people 65–69 is paid at a rate of HKD 2285 per month (approximately \$295). The two parts of the state pension are known colloquially as fruit money. Pension coverage for the younger element is only paid to those on low pay and covers only about 5 per cent of the overall older population, specifically those without access to a work-based pension (Aaron 2013).

In both economies, second-tier pensions exist (i.e. those which are occupational and based on earning), although in both cases, there have been significant variations in occupational pension provision. In the UK, for example, only 35 per cent of private sector employees are members of a workplace pension scheme or belong to an arrangement in which their employers made contributions into their personal pension. Of those employers which offer occupational pensions, 47 per cent restrict access and a further 26 per cent have closed eligibility to new members (Forth et al. 2014). The main reasons employers cited for lack of provision were the cost of operating a pension scheme, along with the relative ineffectiveness of pension provision as a tool for recruiting talent (Metcalf and Meadows 2010).

In response to the Pension Commission Report, the UK Parliament enacted the Pensions Act 2008 which set in motion the creation of the National Employment Savings Trust (NEST) scheme which operates as a vehicle for pension savings for workers without access to an occupational pension scheme. NEST is an employer-provided scheme which is currently being rolled out. From 2018, employees will be auto-enrolled into schemes which their employers nominate. Pension savings are accrued through a combination of employee and employer contributions as well as tax relief. From 2018, the minimum pension contribution is 8 per cent of qualified earnings (currently assessed at between GBP 5772 and 41,865 a year), made up of a contribution of 4 per cent from the employee, 3 per cent from the employer and 1 per cent from the government through tax relief.

In Hong Kong, from 1993 to 2000, occupational pension arrangements were provided by employers on a voluntary basis and governed by the Occupational Retirement Scheme Ordinance (ORSO). As with the UK, only a minority of Hong Kong employees were covered by an employer-supported second-tier pension scheme, with the Labor Department estimating 900,000 out of a 3.5 million total (Civil Service Bureau 2013).

In 1995, the Hong Kong legislature passed the Mandatory Provident Fund (MPF) Ordinance which, since coming into effect in 2000, has mandated that 5 per cent are contributed each from employees and employers (up to a maximum monthly salary of HKD 30,000 and for the employee contribution, a minimum threshold of HKD 7000 per month) into a defined contribution (DC) provident

fund which pays a lump sum to the employee upon retirement. Different contribution arrangements apply to self-employed people, and an employer which provides an eligible occupational pension scheme is exempt from MPF contributions. MPF contributions are paid into investment funds provided by banks and regulated by the state, and employees select from a range of schemes which are offered in the market. Schemes are portable except for industry-specific schemes which operate in catering and construction to cover casual workers in these two sectors. NEST and MPF differ in three important ways. First, while MPF contributions go into regulated savings schemes provided by the banks, the NEST fund is managed by a non-departmental public body accountable to Parliament through the UK Department for Work and Pensions (DWP). While under MPF employees select from a range of privately provided but regulated schemes, the NEST scheme is managed by government appointed trustees. Second, while MPF operates as a mandatory scheme for most Hong Kong workers who are not otherwise covered by an occupational pension scheme, when NEST is fully rolled out, it will operate as an “auto-enrollment” scheme which employees can opt out of. In its second report, the UK Pension Commission argued that the main barriers to workers setting up a personal pension were inertia, confusing pension advice and high administrative costs (Pension Commission 2010: 69). The setting up of NEST was meant to address the latter two problems, while auto (rather than mandatory) enrolment was meant to take on the first. There are, however, three ways in which MPF and NEST are similar. First, they have been set up to create near universal second-tier pension provision to top up a minimal but redistributive state pension system in the respective economies. Pensions are funded through employee and employer matched contributions rather than directly by the state. Second, both schemes were put in place to complement rather than replace employer-provided occupational pensions. Both schemes started in economies in which roughly only one-third of private sector workers were covered by occupational schemes. Under Hong Kong law, an employer which operates an ORSO scheme must give new employees the option of joining an MPF scheme instead of ORSO, whereas NEST enrolment for employees is not now mandatory for employers who operate an eligible pension scheme.

Third and most significantly, as DC pension schemes, the two government schemes operate to place investment risk onto the employee rather than employer since it is the employee who absorbs the financial loss resulting from poor investment returns. In its first and second reports, the UK Pension Commission (2010: 121) argued that defined benefit (DB) pension schemes, particularly final salary ones, were the result of “historical accident” and atypical compared with other countries. It argued that DB schemes have operated to pull older workers out of the labour market earlier than DC schemes since

employers use early retirement incentives as ways to encourage older workers to retire early in order to make way for younger workers. It also argued that DB schemes had generally poorly prepared for increasing life expectancies, resulting in closure of schemes and generational inequalities.

As the fool's paradise has come to an end, schemes have been closed to new members, and a shift to less generous Defined Contribution (DC) schemes has followed. The underlying level of funded pension saving is falling rather than rising to meet the demographic challenge, pension right accrual is becoming still more unequal, and risk is being shifted to individuals sometimes ill-equipped to deal with it. (First Report- xiii, Pension Commission 2010: 3)

Government policy in the UK is aimed at accelerating rather than slowing movement away from DB schemes. Currently, employers which provide DB pensions can contract out a proportion of their contributions to employees' National Insurance. Under proposals to introduce a universal state pension, the government is proposing to eliminate the contracted out element and has suggested that employers can offset the costs by reducing the employer contribution (DWP 2013b).

Both Hong Kong and the UK faced significant gaps in occupational pension coverage. Prior to the introduction of MPF, only 35 per cent of Hong Kong residents had access to an occupational pension (World Bank 1994), while the UK Pension Commission concluded that 12 million British workers, almost 40 per cent of the total, were under-saving to retirement (Pension Commission 2010). At the same time, the two populations have been ageing. Both governments have responded to the widening pension gap through bold initiatives to extend access to second-tier pensions but extending coverage at the expense of availability of DB schemes, thereby shifting responsibility for preparing for longer retirements from employers to workers. However, alongside measures to encourage greater savings, pension ages have and are likely to continue to rise (DWP 2010) which, in turn, necessitates employers to facilitate longer working lives. In the next section, we will discuss how the two governments are intervening in the labour market.

Promoting Age Diversity Among Employers

Next, we turn to government approaches to encourage employers to retain older workers. Given that the risk of both investments and increased longevity are placed on the individual rather than the state or employers, greater

flexibility in managing career and extending working life in order to ensure adequate retirement income would seem to be an essential part of the social compact. Both the International Labour Organization (2009) and UN Madrid Conference (Alexandre 2004) have called for measures to expand workplace rights, including consideration of eliminating mandatory retirement as one way of eliminating old-age poverty.

Both the UK and Hong Kong governments have taken a largely volunteerist approach to employer engagement centred on arguing with employers the “business case” of extended working life (Flynn 2010). This approach is mainly based on highlighting the value of retaining older workers in terms of experience and knowledge transfer. Negative images of older workers (such as inflexibility and reluctance to learn) are challenged as reflections of how older workers are managed rather than their own limitations. In Hong Kong, guidance was issued by the Labour Department primarily focused on recruitment, appraisals and dismissal (including retirement) (HK Labour Department 2006). In the UK, the DWP originally led the national campaign to promote the employability of older workers through its *Age Positive* campaign. This has lately been taken over by a network of employers and voluntary organisations known as the Age Action Alliance. Good practice guidelines have been produced by the Department of Work and Pensions (DWP 2013a) as well as stakeholder groups like the Trades Union Congress (TUC) (Flynn and McNair 2011) and the main organisation representing HR professionals, the Chartered Institute for Personnel and Development (CIPD) (McNair and Flynn 2012).

As noted above, a distinguishing feature of both economies is the short-term employment contractual relationship and “external labour market” in which older people work. The UK has historically had higher participation rates than its EU neighbours largely because of the lack of institutional barriers to employers retaining older workers beyond pension age (Kok 2004). Similarly, Hong Kong has had a high male participation rate relative to mainland China and Taiwan, although employers can and often do enforce mandatory retirement rules followed by rehiring older employees on a contingent or consultancy basis (Francis and Anise 2013).

Hong Kong currently features employment regulations prohibiting workplace discrimination on the basis of gender, disability, family status and race. Age discrimination is not prohibited and employers are permitted to set mandatory retirement rules which both large companies and the public sector normally do. There are currently no plans by the government to introduce age discrimination regulations. The Equal Opportunities Commission (EOC) has recently concluded a review of the four discrimination regulations. Although the EOC identified ageing populations as major demographic

change impacting on Hong Kong workplaces (para 7), it also ruled out consideration of new regulations on age discrimination (EOC 2014).

Mandatory retirement age in Hong Kong is 60 for most public sector employees which is set in line with public sector pension ages (a DB pension scheme contracted out from MPF). In 2014, the Chief Secretary introduced proposals to raise the retirement age in the Civil Service to 65, giving civil servants the option to reduce working hours or take on a mentoring role while delaying retirement for up to five years. The proposals are supported by the main Civil Service unions. However, in order to extend working life beyond 60, civil servants will be required to undergo annual health and performance assessments. Unions have opposed this aspect of the proposals, fearing that managers will use assessments as a tool for dismissing older subordinates at will. The Hong Kong Chamber of Commerce has also been supportive of government proposals, anticipating that private sector employers will follow suit.

Over the medium term, we need to keep the workers we have and attract more people to take up employment. Flexible employment options and extending retirement age will help, and the business community has moved in this direction for many years. The Government needs to do the same, as the Civil Service is facing its own demographic challenges. (HKGCC 2013)

The UK government, on the other hand, has introduced age discrimination regulations in 2006. The Employment Equality (Age) Regulations 2006 (SI 2006/1031) (hereafter referred to as the Age Regulations) covered a range of workplace issues including pay, benefits, recruitment and redundancy. These Age Regulations implemented the age aspects of European Commission Directive 2000/78/EC establishing a general framework for equal treatment in employment and occupation.

While drafting the Age Regulations, one of the most difficult issues which the Department of Trade and Industry (now the Department for Business, Innovations and Skills) faced was whether or not to allow employers to set mandatory retirement ages. In the end, the Government accepted the employers' case and opted to set a DRA of 65. Although employers were allowed to compulsorily retire employees at 65 (or in some cases, even younger), the Age Regulations did impose a "duty to consider" (DTI 2005) requests to delay retirement. So long as the employer followed the procedure set out in the Age Regulations for informing and consulting the employee on the decision to retire, it was able to compulsorily retire the employee without needing to justify its decision.

At the time the age regulations were introduced, the then Labour government had pledged to review the DRA with a view towards abolition within a five-year time frame. This review was brought forward and in October 2011,

Table 20.1 Institutional context comparison: UK and Hong Kong

	UK	Hong Kong
<i>Pension</i>		
First tier	Basic pension of GBP 115.95 per week. Single pension (combining first and second tier) to be introduced in April 2016	Old age allowance HKD 2285 per month
State pension age	From 2018, 65 for men and women. Rising to 66 by 2020, 67 by 2036 and 68 by 2046	Age 70 in OAA; Age 65 in MPF
Second tier	Mainly employer provided (14–26 per cent employer contributions in public sector; 6.4 per cent in private sector DC schemes) NEST introduced in 2014: 3 per cent employer contribution and 1 per cent government	Mandatory provident fund
<i>Labour market</i>		
Employment protection	Low	Low
Age discrimination regulations	Equality Act 2010	None (voluntary code of practice for employers)

the Coalition government abolished the DRA. However, employers are able to retain mandatory retirement ages for their workforce or sections of their workforce, if they have an objectively justified reason for doing so. Although surveys of businesses suggest that many employers would like to have the power to set a mandatory retirement age, few organisations have done so. The most prominent employers to have reintroduced a retirement age have been Cambridge and Oxford Universities which had set retirement ages at 67 for professors justified by a professed need to enable progression for younger academics (Flynn 2014). Table 20.1 gives a summary of both the social welfare and employment regulatory contexts in the two economies.

Discussion

Ageing demographics are putting strains on both governments and employers around the world. Not only are expanding older populations creating strains on social security systems but also absent changes in real retirement ages and shrinking numbers of young people entering the labour market are likely to lead to chronic skills shortages. Governments are therefore looking for ways both to ensure the sustainability of retirement systems as well as to encourage longer working lives.

Liberal market economies as well as residual welfare states have primarily depended upon the flexibility of the older labour market to sustain extended working life. Historically, economies like the UK and Hong Kong have

maintained higher levels of older workforce participation than coordinated market economies, such as Germany, by featuring few institutional barriers to extended working life and limiting incentives for older workers to retire early on enhanced pension offers.

In this chapter, we have discussed two case study economies, the UK and Hong Kong, in which government has sought to extend pension coverage as well as encourage longer working lives. In both cases, governments have placed responsibility for savings and preparing for extended longevity on the individual rather than the employer. In the case of Hong Kong, the government has resisted introducing age discrimination regulations. Proposals are however being made to raise public sector retirement ages from 60 to 65. The UK government has enacted regulations to prohibit age discrimination, but this was to transpose an EU directive, and without such pressure would likely have also relied on voluntary engagement with employers (Muller-Camen et al. 2011).

Hong Kong's development of MPF provides some indication that the UK's NEST programme has promised in extending pension coverage. According to the OECD, average pension wealth in Hong Kong is now six times the average annual earnings against a 4.2 times figure for the UK (OECD 2009). However, although MPF portfolios have performed relatively well, income disparity has risen among the aged in large part because of the weakness of the first-tier pension as a vehicle for income redistribution and the individualisation of pension contributions, as low-income people are much less likely to pay into their pensions above the minimum rate (Lee et al. 2014). This can be particularly problematic within a context in which older people who have under-saved can lawfully be excluded from work.

A lesson which can be learned from the UK experience in managing increased retirement ages which could be applied to Hong Kong is the gradual approach to abolishing mandatory retirement by way of a DRA. At the time that the DRA was introduced, the age lobby, TUC and CIPD had all favoured abolition of mandatory retirement while the Confederation for Business and Industry had opposed such regulations, arguing that abolition would restrict employers in being able to "retire older workers with dignity" (CBI 2003: 1). The UK government's approach was to initially require employers only to consider requests from employees who wanted to stay in work beyond 65. The approach is broadly consistent² with regulations requiring employers to consider requests from employees who require flexible working for caring

²The right to request working beyond the DRA did not operate exactly the same as the right to request flexible working. The principal difference was that with the latter, employers which reject employee requests must do so with reference to a set of "objectively justified" business case reasons as set out by the government agency Advisory, Conciliation and Arbitration Service.

responsibilities which has recently been extended to all employees. According to a review by DWP, most requests from employees to stay beyond the DRA had been granted. Further, the abolition of the DRA was scheduled for 2011. Since that point, while employers have generally expressed annoyance with regulations preventing mandatory retirement, very few organisations have sought to reintroduce such HR policies.

The conclusion that we can reach is that both the UK and Hong Kong governments have responded to the challenge of ageing demographics to place responsibility predominantly on the individual rather than the state or the employer to save for longer retirements, while placing minimal pressure on employers to enable older workers to extend working life. This indicates that similar institutional systems are reacting in similar ways to changing age demographics. The experience of the two economies suggests that further cross-country comparative research of public policy responses merits attention because sharing experiences and practices between such rather similar economies would lend themselves better to comparative analysis than would those of contrasting systems. From a theoretical perspective, this allows to explore whether similar national systems are, in fact, showing similar policy responses or whether and how actors have space to diverge from their institutional path to implement institutional change, as discussed, for example, by Battilana et al. (2009). On a practical level, such a cross-country comparison lends itself to more informative public policymaking as can be demonstrated in how Hong Kong and the UK have adapted their pension systems and employment regulations. However, further research on how ageing demographics are impacting the Tiger economies is needed not only because of the institutional differences between Western and Asian economic systems but also because of generational differences in terms of longevity, education and savings towards retirement.

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Age-Based Generations at Work: A Culture-Specific Approach

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Introduction

Shore et al.'s (2009) annotated review of diversity at work concludes that relative to other forms of diversity such as race and gender, age-based diversity has been an under-researched area. This was partly related to the fact that unlike race and gender, organisations were rarely found to take age-based initiatives (Shore et al. 2009). However, in more recent years, this situation has changed. The impending retirement of more than 75 million older workers has created a crisis in organisations as they strive to attract, retain, and ultimately assimilate a comparable number of young people who purportedly hold significantly different values, attitudes, and expectations from the generations of workers who preceded them (Ng et al. 2012; Twenge et al. 2010). As a result, leading organisations (i.e., Marriot International, Sodexo, Tata Consulting Services) have begun implementing interventions to appease the perceived high demands and expectations of the incoming generation of the workforce.

Within this context, an ever growing body of scholars is currently undertaking research on generations at work. This stream of research advocates that a better understanding of the prevailing generations in the workforce can assist human resource management professionals in developing and maintaining a work environment that fosters leadership, motivation, communication, and

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engagement (Gursoy et al. 2013; Lyons and Kuron 2014), avoiding in turn conflict, an impediment to the effectiveness of even the most sophisticated organisations (Zopiatis et al. 2012).

Unfortunately, as is often the case in nascent streams of research, findings have been contradictory and generally inconclusive (Ng et al. 2012), and scholars are currently facing conceptual and methodological issues (Costanza et al. 2012; Lyons and Kuron 2014; Parry and Urwin 2011). Of particular note is the relative failure to incorporate the impact of national culture on the conceptualisation of age-based generations. Such omissions have been discussed in the context of organisational behaviour by Lyons and Kuron (2014: S152) who advocate that a more careful consideration of the historical and social conditions of the nation of interest and definitions of generational groups unique to that national culture is needed; a challenge taken up by this chapter.

The aim of this chapter is to promote the culture-specific sequence of generations for studying age-based diversity at work, using the Greek workforce as a case study. This is the first study to consider the nature of generations in Greece in this way. The major shift that is currently occurring in the Greek workforce with a large cohort of older employees exiting their leadership roles and a comparable number of young workers dramatically entering as replacements (Papavasileiou and Lyons 2015) makes Greece a suitable context. Accordingly, the chapter begins with a discussion about Mannheim's seminal sociological approach to the formation of generations before going on to provide more recent elaborations through the lens of culture. The following part illustrates the dominant paradigm in the extant literature of adopting the US culture-specific sequence of generations as a 'globally appropriate' conceptualisation using evidence from studies that explored the phenomenon within a multidisciplinary field of learning and across a variety of cultures and occupations. To move away from this rather limited view, the subsequent discussion provides a more careful consideration of the historical and social conditions in Greece to define generational groups unique to the Greek national culture. The concluding part summarises the work conducted and provides further directions using an application of the culture-specific approach to the Portuguese workforce.

The Formation of Generations

The term generation has its roots in the Greek word *genesis* and refers to a system of descent (parent–child), a sequential process resulting from the biological fact of birth. However, belonging to—and/or distinguishing from—a

specific generational group encompasses a sense of awareness of one's own personal identity and a pattern of an adult–adult interaction within a given society. Generations therefore function as a spectrum for projecting a psychological and sociological eidolon of individuals' life course. Thus, within the popular debate regarding the formation of generations, scholars have mainly drawn on two accounts of life course to provide a critical perspective about the phenomenon, the psychological and the sociological. The former adopts the construct of generations as a proxy for capturing the complexity of age-based identity within the private sphere of the individual life course and then progress through the public sphere of social structure (Biggs 2007). The latter explores the phenomenon as it takes place in the public spheres of social structure and then illustrates the consequences for the individual (Biggs 2007). Extant research on age-based generations at work has vastly relied on the sociological approach, considering generations as a structural component of the workforce emerging through the dynamic process of social change.

The Sociological Approach

The sociological approach to generations is largely predicated on the theoretical foundations set by Mannheim (1893–1947), as articulated in his seminal essay 'The problem of generations' (1952). As with Marxist theories of social class, Mannheim viewed generations as a means of understanding social structure, with an emphasis on the procedures of social change. Mannheim believed that all individuals, in a conscious or unconscious manner, belong to a specific generation, on the basis of their year of birth and their place in historical time.

At the time of his theoretical articulation, this view was in contradiction to the commonly considered definition of generations as a successive biological phenomenon. Mannheim recognised the significance of the biological process of birth, aging, and death in the formation of generations but argued that the influence of the changing historical circumstances also needs to be taken into account. He noted that, 'were it not for the existence of social interaction between human beings – were there no definable social structure, no history based on a particular sort of continuity then generations would not exist as a social location phenomenon' (1952: 290–1).

As a social location phenomenon, generations therefore emerge not just by one (horizontal) dimension of birth group but also by a second (vertical) dimension of historical process. The meeting point of birth groups and historical process creates a two-dimensional space and objectively positions

each generation across the pattern of social structure. However, the subjective component that forms generations in actuality appears only when ‘a concrete bond is created between members of a generation by being exposed to the social and intellectual symptoms of a process of dynamic de-stabilization’ (p. 303). The shared exposure of an age-based group to a historically specific context during the early formative years serves as a basis for the development of an identity of responses.

Within this context, Mannheim’s sociological approach describes generations as age-based group products of a ‘lived through history’ (Vincent 2005: 581), with distinct boundaries fixed by specific economic, social, political, and/or technological changes and distinct identities of responses forged by the shared exposure to these events during the early formative years.

The Cultural Interpretation

Elaborating on Mannheim’s sociological approach, a body of the literature has recently provided a cultural mode of interpreting the formation of generations. As a case in point, Pilcher’s (1994: 488) widely cited reiteration of Mannheim’s theory posits that each social generation, although contemporaneous with other generations, has a distinctive historical consciousness which leads them to experience and approach the same social and cultural phenomena differently. The term ‘historical consciousness’ denotes a more psychodynamic character to the formation of generations and has been commonly used by many contemporary sociologists to depict the ‘concrete bond’ ascribed to generations. McMullin et al.’s (2007) interpretation of Mannheim’s work through the lens of culture describes the ‘concrete bond’ as a subjective experience of the historical consciousness and ‘generational location’ as an objective component of generations. Within this context, McMullin et al. (2007: 299) define generations as a unique type of social location based on the dynamic interplay between being born in a particular year and the sociopolitical events that occur throughout the life course of the birth group, particularly while the group comes of age.

Gilleard’s (2004) culturally distinctive conceptualisation of Mannheim’s key aspects replaces the term ‘generational location’ as ‘generational field’ and the term ‘concrete bond’ as ‘generational habitus’. The term ‘field’ was implemented to encapsulate the ‘emergence of a changed relationship between past and present social spaces’ (p. 114). In addition, the term ‘habitus’ denotes those ‘dispositions that generate and structure individual practices and which emerge and are defined by the forces operating in a particular generational field’ (p. 114).

Eyerman and Turner (1998) have also integrated the habitus to provide a culturally oriented formation of generations. For them, the phenomenon takes place within a common habitus, hexis, and culture where the group of individuals passing through time develops a collective memory that serves to integrate the group over a finite period of time. In this approach, habitus denotes a ‘shared collective cultural field (of emotions, attitudes, preferences and dispositions) and a set of embodied practices (of sport and leisure activities)’ (p. 93), indicating thus that generations are formed in a specific cultural context. In a similar vein, Vincent (2005) describes generations as shaped by the formative influences experienced by groups during the early years of adolescence or young adulthood. In particular, elaborating on Mannheim’s generational location, Vincent (2005: 584) posits that these formative influences are local and specific and emergent from personal biography and family and community situation, suggesting that generations are products of one’s specific cultural context.

In the light of the above, it is argued that the formation of generations is a cultural construction phenomenon. This is a reflexive process where age-based groups are first experiencing the circumstances in the specific cultural context, then are critically evaluating the opportunities and challenges, and ultimately are formulating their behaviour based on shared cultural reference points which allow them to reshape the essence of ‘their time’.

Age-Based Generations at Work

Since the turn of the century, scholars have eagerly adopted the notion of generations as a reified means of classification for studying age and age-related issues at work. Table 21.1 illustrates the age-based classifications of generations in the current workforce within a multidisciplinary field of research and across a variety of cultural contexts (Australia, Belgium, Brazil, China, Cyprus, Finland, Germany, Netherlands, Singapore, the UK, and the USA) and occupations (nurses, hotel workers, university workers, construction workers, radiologists, workers in IT organisations, and workers in a multinational organisation). Overall, there is a general descriptive consensus on classifying the current workforce along three prevailing age-based groups: Baby Boomers (those born between the end of World War II and the early-to-mid-1960s), Generation X (those born between the early-to-mid-1960s and the late 1970s to early 1980s), and Generation Y or Millennials (those born after the late 1970s to early 1980s).

Table 21.1 Classification of generations at work across cultures and occupations

Study	Workforce classification		Generational classification	
	Cultural	Occupation	Label	Boundaries
Real et al. (2010)	USA	Construction workers	Baby Boomers Generation X Millennials	1946–1964 1965–1979 1980–2000
Twenge et al. (2010)	USA	Seniors in high schools	Baby Boomers Generation X Generation Me	1946–1964 1965–1981 1982–
Busch et al. (2008)	USA	Personnel in IT organisations	Baby Boomers Generation X Generation Y	1945–1964 1965–1979 1980–
Beutell (2013)	USA	General workforce	Baby Boomers Generation X Generation Y	1945–1964 1965–1978 1979–
Moriarity et al. (2014)	USA	Radiologists	Baby Boomers Generation X Generation Y	1946–1963 1964–1980 1981–2000
Gursoy et al. (2008)	USA	Personnel in hotels	Baby Boomers Generation X Millennials	1946–1964 1965–1980 1981–2000
Brunetto et al. (2013)	USA	Nurses	Baby Boomers Generation X Generation Y	1943–1964 1965–1979 1980–2000
Meretoja et al. (2012)	Finland	Nurses	Boomers Generation X Generation Y	1946–1960 1961–1981 1982–2000
Dries et al. (2008)	Belgium	Personnel in universities	Baby Boomers Generation X Generation Y	1946–1964 1965–1980 1981–2000
Lub et al. (2011)	The Netherlands	Personnel in hotels	Baby Boomers Generation X Generation Y	1945–1964 1965–1980 1980–
Zopiatis et al. (2012)	Cyprus	Personnel in hotels	Baby Boomers Generation X Generation Y	1945–1964 1965–1980 1980–
Nelson (2012)	Brazil	Nurses	Baby Boomers Generation X Generation Y	1946–1965 1966–1980 1980–
Robson and Robson (2015)	UK	Nurses	Baby Boomers Generation X Generation Y	1945–1964 1965–1981 1982–2000
Cogin 2012	USA, Australia, China, Singapore, and Germany	Personnel in a multinational organisation	Baby Boomers Generation X Generation Y	1947–1963 1966–1976 1979–1994

Source: Author

This classification originates from Strauss and Howe's work as first introduced in 1991 with *Generations: The History of America's Future, 1584–2069* and later extended in 1997 with the *Fourth Turning: What the Cycles of History Tell Us About America's Next Rendezvous with Destiny*. Within these publications, Strauss and Howe conceptualised America as a sequence of 19 generations. The post-World War II generations were labelled as Baby Boomers (1946–1963), Generation X (1964–1980), Millennials (1981–2001), and Homeland Generation (2002–) corroborating to the classification commonly used in the extant literature in relation to generations at work.

Strauss and Howe developed this classification as a culture-specific conceptualisation using, for instance, the assassination of President Kennedy in 1963 as a demarcating event between Baby Boomers and Generation X. In addition, the election of Ronald Reagan in the presidency of the USA was the event that separated Millennials from Generation X. Furthermore, the key events that have been responsible for the formation of generational identity in these groups were unique to US history (i.e., the Levittown housing development in 1952, the Little Rock crisis in 1957, the Affluent society, the Summer of Love in 1967, the Chicago Democratic Convention in 1968, the Vietnam War, Woodstock in 1969, the incident in Kent State University in 1970, the Watergate scandal in 1972, the tax revolt in 1978, the Culture Wars during the 1990s, the Long Boom from 1991 to 2001).

Strauss and Howe's conceptualisation of America as a sequence of generations is perhaps the best application of the cultural interpretation of generational formation and has therefore been commonly adopted by scholars exploring the phenomenon within the USA. However, adopting this US-specific classification as 'a globally appropriate' conceptualisation for studying generations at work is rather questionable. Lyons and Kuron (2014: S147) warns future researchers and scholars that this approach contravenes a core tenet of generational theory—that generations are the product of their social and historical context. Only when such contexts are similar across nations should we expect to see commonalities in generational configurations and common generational identities. Moreover, recent evidence has stressed the need for considering the specific cultural context when studying generations at work, even among the post-80s generation which has been considered as a 'global generation' (see Papavasileiou and Lyons 2015). Moving away from the rather limited view expressed in the extant literature, the following part describes a culture-specific sequence of generations for studying age and age-related issues within the Greek workforce.

The Greek Workforce as a Sequence of Generations

Before proceeding, it is important to note that rather than focusing on the entire population of the Greek society, the conceptualisation is solely focused on those who are of working age. Within this context, individuals older than the official retirement age are considered as unlikely to be employed in significant numbers in the Greek workforce. Indeed, according to OECD estimates (see Table 21.2), while the official retirement age in Greece is 65 for men and 63 for women, the average effective age of retirement comes earlier. In particular, the average effective age of retirement for men between 2007 and 2012 is estimated at 61.9 and for women at 60.3 (OECD 2013). It is therefore expected that age 65 should adequately cover the vast majority of individuals who are still in employment within the Greek workforce. In addition, the lower limit of age, as in most studies, is considered the age of 18. This is the age that most individuals have completed secondary education. Thus, the conceptualisation includes working members aged 18 (the age at which the majority of Greeks have completed secondary education) to 65, or at the time of writing, those people born between 1949 and 1996.

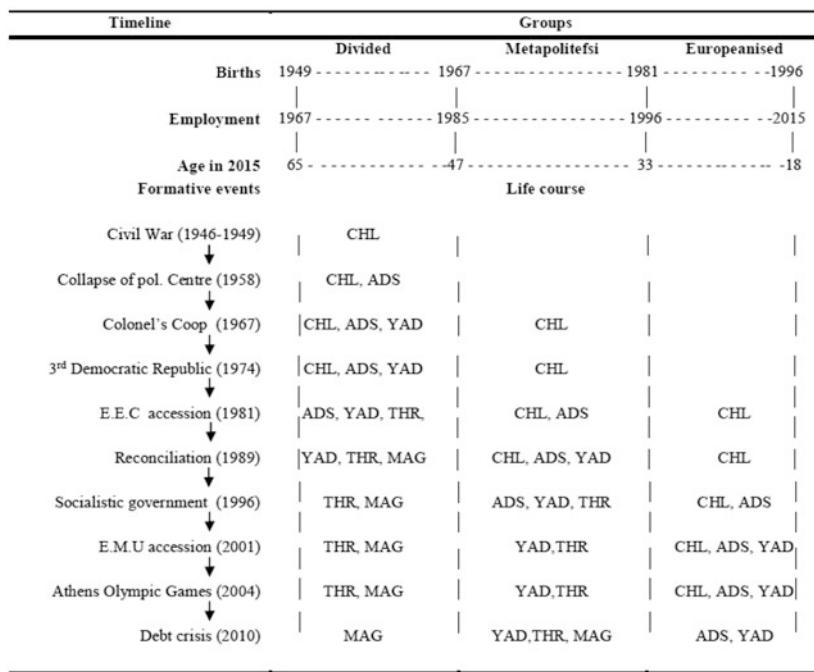
Following the cultural approach described earlier, the generational composition of the Greek workforce emerges as a two-dimensional space. The horizontal dimension is represented by the years of birth and the vertical dimension by the revolutionary events that happened during the period 1949–1996. In relation to the latter, Fig. 21.1 depicts a number of subsequent social, political, and economic events that came to occupy the centre of Greece's post-World War II historical stage. Among them, a four-fold legacy of events is: (a) the divisive civil war (1946–1949) that followed the liberation from German occupation, (b) the 1967 colonel's coup which lead to a seven-year dictatorship, (c) the 1981 accession in the European Economic Community (EEC) which caused a paradigm shift towards westernised standards, and (d) the election of the Simitis socialistic government in September 1996 which prioritised the meeting of the convergence criteria for accessing the Euro-zone in 2001, integrating Greece further into the European Union (EU) structures. Eventually, these events have shaped the norms of the society, as the members of the Greek workforce came of age resulting in the following sequence of generations.

Table 21.2 Average effective retirement age versus official (OECD countries), 2007–2012

Country	Men		Country	Women	
	Effective	Official		Effective	Official
Mexico	72.3	65	Chile	70.4	60
Korea	71.1	60	Korea	69.8	60
Chile	69.4	65	Mexico	68.7	65
Japan	69.1	65	Iceland	67.2	67
Portugal	68.4	65	Japan	66.7	65
Iceland	68.2	67	Portugal	66.4	65
Israel	66.9	67	New Zealand	66.3	65
New Zealand	66.7	65	Israel	65.1	62
Switzerland	66.1	65	USA	65.0	66
Sweden	66.1	65	Norway	64.3	67
USA	65.0	66	Sweden	64.2	65
Australia	64.9	65	Switzerland	63.9	64
Norway	64.8	67	Turkey ^c	63.6	58
Ireland	64.6	66	UK	63.2	61
Canada	63.8	65	Spain	63.2	65
UK	63.7	65	Australia	62.9	64.5
Estonia	63.6	63	Estonia	62.6	61
The Netherlands	63.6	65	Ireland	62.6	66
Denmark	63.4	65	Canada	62.5	65
Czech Republic	63.1	62.5	The Netherlands	62.3	65
Slovenia	62.9	63	Denmark	61.9	65
Turkey	62.8	60	Finland	61.9	65
Spain	62.3	65	Germany	61.6	65
Poland	62.3	65	Slovenia	60.6	61
Germany	62.1	65	Italy	60.5	62
Greece	61.9	65	Greece	60.3	63.5
Austria	61.9	65	Poland	60.2	60
Finland	61.8	65	France	60.0	65
Italy	61.1	66	Czech Republic	59.8	61
Slovak Republic	60.9	62	Hungary	59.6	63.5
Hungary	60.9	63.5	Luxembourg	59.6	65
France ^b	59.7	65	Austria	59.4	60
Belgium	59.6	65	Slovak Republic	58.7	59
Luxembourg	57.6	65	Belgium	58.7	65
OECD-34 average	64.20	64.65	OECD-34 average	63.06	63

Note: The average effective age of retirement is defined as the average age of exit from the labour force during a five-year period. Labour force (net) exits are estimated by taking the difference in the participation rate for each 5-year age (40 and over) at the beginning of the period and the rate for the corresponding age (aged 5-years older) at the end of the period. The official age corresponds to the age at which a pension can be received irrespective of whether a worker has a long insurance record of years of contributions. For Belgium and France, workers can retire at age 60 with 40 years of contributions; for Greece, at age 59 with 35 years of contributions; and for Italy at 57 (56 for manual workers) with 35 years of contributions

Source: OECD estimates derived from the European and national labour force surveys



Source: Author. Note: CHL=Childhood (birth-12yrs), ADS=Adolescence (13-17yrs), YAD=Young Adulthood (18-29yrs), THR=Thirties (30-39yrs), MAG=Middle Aged (40-64yrs) based on American Psychological Association (APA) age classification.

Fig. 21.1 The generational map of the contemporary Greek workforce

The Divided Generation (1949–1966)

The first group in the two-dimensional space of the Greek workforce generational timeline is comprised of those born after 1949 (end of the divisive civil war) and those born prior to 1967 (colonel's coop). The members of this generation were born prior to 1967 and at the time of the study were aged 49 and older, classifying them as a middle-aged group. We label this group as the Divided (Dihasmeni) Generation (D-ers here after) because their crystallising experiences were mostly comprised of long-lasting divisive events, creating thus a collective memory of bipartition. This generation was raised at a time where Greece faced the consequences of the Civil War with governments imposing policies of dichotomisation. This could be encapsulated in the enforcement of the 516/1948 law which demanded 'a certificate of social reliability' from all those who wanted to be employed in the public sector and/or acquire a passport or a driver license (Siani-Davies and Katsikas 2009). Until 1974, the following categories existed (Samatas 2005):

- ‘Epsilon’ (*Ethnikofrones*, meaning national-minded) with two grades (Epsilon one, El and Epsilon two, E2) which allowed to be employed in the public sector and/or acquire a passport or a driver license and
- ‘Alpha’ (*leftists*), ‘Beta’ (*crypto-communists*), ‘Gamma’ dangerous communists, and ‘Chi’ unknown which prohibited the above.

For many decades, therefore, a schism between the so-called nationally minded (*ethnikofrones*) on the one hand, and the left and its sympathisers, which were deemed harmful to society (*miasmata*), on the other, divided the Greek society. However, in 1958, the collapse of the political centre and the relevant rise of the communist party in the elections signalled the beginning of a new era. This event was the harbinger of the 1963 Papandreu centrist government, which tried to ‘restore democracy’ and bridge the divide. Unfortunately, the cleavage between right and left oppositions remained as deep as ever, leading to the formation of the 1967 coup (Colonel’s junta) (Siani-Davies and Katsikas 2009), an event which marks the boundary between members of the Divided Generation D-ers and the successive age-based group. After the 1967 coup, the Colonel’s junta were in power for seven years and banned all political parties and harshly silenced any criticism of its actions. Thus, as evidenced in Fig. 21.1, the collective experiences of this generation were formed in a highly authoritative environment that fostered the schism of the society based on political criteria.

The Metapolitefsi Generation (1967–1981)

The second location in the generational time line of Greek workforce is occupied by those born after the colonel’s coop (1967) and those born prior to the EU accession (1981). The members of this generation, represent, therefore, at the time of the study, a group of people at their mid-thirties whereas some of them may have been middle-aged. This age-based group will be named as the Metapolitefsi Generation (M-ers hereafter) because their generational consciousness is mainly related with the restoration of democracy and its aftermath, reconciliation and wiping the slate clean from the divisive past. Indeed, only some members of this generation have experienced the Colonel’s junta, mainly during the early years of their childhood (see Fig. 21.1). The post-dictatorship phase, or Metapolitefsi as Greeks call the 1974 transition to multiparty democracy, is marked by a constant effort to achieve a ‘public healing of old scars’ (Siani-Davies and Katsikas 2009: 571). This has been

achieved in two phases, 1974–1981 and 1981–1989, the formative years of this generation (see Fig. 21.1).

In the beginning, the right-wing government of Karamanlis (1974–1980) placed more emphasis on rectifying the worst excesses of the dictatorship, the political exigencies of the time than directly confronting the legacy of the civil war (Siani-Davies and Katsikas 2009). Therefore, they granted a general amnesty for political offences committed under the dictatorship, released all political prisoners, and abolished by law 67/1974 the certificates of social reliability (Kassimeris 2005). Later, the 1981 elected, socialist government of Papandreu, the first since 1924, focused more on erasing the discriminations of past which had excluded large segments of Greek society from public life (Siani-Davies and Katsikas 2009). A series of decrees and laws recognised those who participated in national resistance during World War II, who were not only given pension rights (Siani-Davies and Katsikas 2009) but also authorised the return of political refugees and their children (Close 2004). In 1989, a coalition government was formed and in a symbolic manner, nearly 17 million surveillance files were incinerated, on the 40th anniversary of the battle for Grammos (The Times, 30 August 1989 as cited in Siani-Davies and Katsikas 2009). Thus, the formative experiences of this generation are not only marked by the change in the symbols, the rhetoric, and the constitution but also by an environment that created the space to bridge the divides, forging a national consensus and reconciliation.

The Europeanised Generation (1982–1996)

The boundaries of the third location in the Greek workforce generational timeline are set by those born after the accession in the EU (1981) and those born prior to the election of Simitis socialistic government in 1996. The members of this generation comprise, therefore, at the time of the study people mostly in their young adulthood and early 30s. This age-based group will be defined as the Europeanised Generation (hereafter EU-ers) because the generational awareness of this group has been shaped by the accession to the EEC and European Monetary Union, an affirmation of Greece's economic viability, the technological revolution, and globalisation, which caused a paradigm shift towards westernised standards.

Contrary to previous groups, EU-ers have only experienced democratic governance which has been mainly concentrated on the integration into the wider structures of the EU. The first step has been made in 1981 with the accession

in the European Communities (EC) the precursors of today's EU. This event marked the beginning of Greece's modernisation and also signalled the need to narrow the gap with the more developed societies of the EU. The election of Simitis socialistic government in September 1996 was also a decisive movement in this direction. His governance (1996–2004), inspired by the neoliberal paradigm, prioritised the meeting of the convergence criteria for accessing the Euro-zone, leading to important privatisations, the reduction of inflation, the restriction of public deficit, and the enlargement of the Gross Domestic Product (GDP). The announcement, in 1997, of the nomination of Athens as the hosting city for the 2004 Olympic Games has also helped to achieve this goal. The hosting of such a mega-event exerted a positive effect on the general index of the Athens Stock Exchange, and on particular industries related to the development of the necessary infrastructure (Veraros et al. 2004). This positive effect was brutally interrupted in 2010, when the newly elected government of socialist George Papandreou announced that the budget deficit of Greece had reached -15.6 per cent of GDP. This event marked the beginning of a debt crisis that leads to austerity measures, orienting the boundary between EU-ers and the successive generation. Thus, the formative experiences of this generation were developed outside of any divisive habits of the past, in an optimistic, progressive, opportunistic environment that embraced the social, economic, and political norms associated with the accession in the EU and the Euro-Zone.

Discussion

Current discussions in the literature of generations at work underline the need for new perspectives and methodological approaches to investigating the phenomenon in order to establish the validity and value of generations as an axis of diversity (Parry 2014). This chapter addressed this need by providing an alternative approach for conceptualising generations at work as a culturally constructed phenomenon, achieved through a reflexive process. Using an elaboration of the sociological approach to the formation of generations through the lens of culture, it has been argued that history imbues people with a cultural toolbox forged by the changing social, political, economic, and technological circumstances. In order to face the opportunities and challenges that arise in the life domain of work, each generation selects from the cultural tool box, an identity of responses, reshaping thus the times in which each generation came of age. By shifting the emphasis from the biological and psychodynamic rhythm of life course to a sociocultural mode of experiencing

life, an alternative perspective to describe generational belonging in the life domain of work emerges. The formation of generations is therefore conceptualised not only as a product of people's birth period and maturation process but also as a 'cultural tank' filled with variable influences, created at a particular historical moment, able to forge unique identities of responses, separating thus each group from the others.

This perspective contradicts the tendency within the extant literature to implement the US culture-specific sequence of generations, as a globally appropriate conceptualisation. This chapter clearly illustrated that the historical and cultural events that shaped the current generational landscape in Greece differ markedly from those that occurred concurrently in the USA. While post-war US children were raised in a positive, optimistic, family-centric opportunistic and progressive environment as described by Strauss and Howe (1991), Greece was embroiled in a divisive civil war in the early post-war era (1946–1949). During this period, Greece suffered approximately 60,000 casualties, 20,000 children were relocated to communist countries in Eastern Europe and 700,000 people were driven from their homes. By 1951, one-third of the population was dependent on public subsidies (Margaritis 2001). This bitter conflict divided the country (Danforth and Van Boeschoten 2011). The reconciliation was a lengthy and torturous process marked by faltering democracy in 1950s (Siani-Davies and Katsikas 2009), a seven-year dictatorship (1967–1974), the restoration of democracy in 1974 and the accession in EEC in 1981. Within this context, it has been argued that considering the US paradigm as appropriate for studying age and age-related issues within Greek workforce is rather questionable and more importantly inconsistent with the basic tenets of generational theory.

By drawing attention to the chronological succession as a key aspect of generational formation and by determining generational boundaries using revolutionary events that are contingent on the specific cultural context in which they became meaningful, the following age-based generations were considered to prevail the current Greek workforce: the *Divided Generation* (1949–1966), the *Metapolitefsi Generation* (1967–1981), and the *Europeanised Generation* (1982–1996). Future scholars and practitioners can use the same approach to explore and establish empirically sequences of generations unique to other countries of interest. Portugal, for example, is a country that shares post-World War II historical similarities to Greece, including (a) the transition from dictatorship to democracy during the mid-1970s, (b) the EU accession in the 1980s, (c) the replacement of their national currencies by euro in 2002 (European Monetary Union), and (d) the debt crisis that faces the past few years.

Furthermore, post-World War II history in Portugal has a similar unique four-fold legacy of events: (a) Oliveira Salazar's 1949 institution of the first of the two five-year fiscal schemes that aimed to develop his corporatist 'Estado Novo' (New State), (b) the 1968 succession of Salazar by Marcello Caetano, (c) the 1986 accession in the EEC, which caused a paradigm shift towards westernised standards, and (d) the 2002 accession into the Euro-zone which facilitated a wider integration for Portugal into the EU structures. These events had a catalytic role under historical circumstances in which the members of today's Portuguese workforce came of age, demarcating them into three prevailing age-based generational groups:

- (a) *Estado Novo Generation* (1947–1968). The members of this generation were raised in an authoritarian and colonial context.
- (b) *Carnation Generation* (1969–1986). The members were marked by the Carnation revolution in 1974 which put an end to both Portugal's colonial remnants and the half-century authoritarian regime inaugurated by Salazar.
- (c) *Europeanised Generation* (1987–2002). Contrary to the previous age-based cohorts, members of this generation have only experienced democratic governance which has mainly concentrated on the integration into the wider structures of the EU.

Conclusion

As with all endeavours of classifying and/or categorising, determining the lines that demarcate each generation in a given society should be viewed with an element of caution. Considering the formation of generations broadly as a maturity phenomenon, forged by the historical circumstances imposed during the times of change, cannot be helpful. The formation of generations is a local and specific phenomenon, shaped by influences of personal biography, family, and cultural setting (Papavasileiou and Lyons 2015; Vincent 2005). The perspective presented in this chapter paves in this direction emphasising that national culture is a key aspect in the formation of generations and that generational boundaries are contingent on the specific cultural settings in which they become meaningful.

More importantly, the conceptualisation developed in this chapter offers a fruitful avenue for exploring work values across generations of Greek workforce. The inherent assumption that follows the conceptualisation is that the process of growing up in each of the identified periods will have a direct

impact on Greek's values, and these values will be shared by all Greeks born during the same time frame. Joshi et al. (2010) argues that these unique set of values will have a consequence for individuals' behaviours in the workplace. Thus, future scholars could use the culture-specific generational timeline of the Greek workforce to examine the work values similarities and differences of the prevalent generations in the Greek workforce. This chapter offers valuable insights into the characteristics of each generation so future scholars can identify which types of work values each generation will prioritise.

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Young at Heart, but What About My Body? Age and Aesthetic Labour in the Hospitality and Retail Industries

Dennis Nickson and Tom Baum

Introduction

In 1992, Michael Gottlieb, at the time the proprietor of a well-known London restaurant, wrote in a letter to the *Caterer and Hotelkeeper* that

I fail to understand why employers ought not to be able to discriminate about potential employees on the basis of age, at least for those who are in contact with the public. We are in a business where image counts as much as content. Of course, it is unfair to turn down older people with the required technical skills to do the job, but so what? It is not a perfect world. (Gottlieb 1992: 20)

These sentiments would seem to succinctly encapsulate the view that in industries with significant amounts of customer contact, being young would seem to be an advantage in securing employment. The chapter considers this point with a particular focus on the customer-facing industries of hospitality and retail. Concentration on hospitality and retail recognises that these industries

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are a key part of the economies of developed and, increasingly, emerging economies. For example, hospitality and retail combined provide around five million jobs in the UK economy—over 20 per cent of total employment in the UK—with retail being the largest private sector employer in the UK (Green et al. 2014; People 1st 2013). In a European context, hospitality and retail are major employers providing over 36 million jobs in the 28 member states of the European Union (Ernst & Young 2013; ILO 2015). Similarly, within the USA, hospitality and retail provide over 28 million jobs (Bureau of Labor Statistics 2015a, b). Within an emerging economy context, Otis (2008) and Hanser (2007) chart the growth of a rapidly expanding service sector and consumer economy in China such that hospitality and retail are now suggested as being the mainstay of new employment in urban centres such as Beijing.

In recognising the centrality of hospitality and retail employment to contemporary economies, the chapter engages with the manner in which organisations in these industries are placing an increasing emphasis on managing their employees' appearance, or what is often known as their 'aesthetic labour'. The term aesthetic labour emerged from research undertaken by what has been described as the 'Strathclyde group' (Karlsson 2012). In a series of publications in the early 2000s, Dennis Nickson, Chris Warhurst and Anne Witz highlighted how service organisations increasingly hire employees on the basis of their appearance as a means to match the employee with the brand image (Warhurst et al. 2000; Nickson et al. 2001; Witz et al. 2003). In this manner, Davies and Chun (2012), writing from a services marketing perspective, note that 'employees can influence the associations that a customer makes with a corporate brand not only by what they do and how they do it, but by how they appear to the customer' (p. 663). Thus the chapter will initially begin by defining aesthetic labour and highlight the potential relationship between this concept and age. Having done this, the chapter then moves on to consider how these issues play out within the hospitality and retail industries, industries which, as suggested above, often have an explicit focus on brand image. In this discussion, we are also cognisant of the impact of demographic change in many Western societies. On the one hand, the changes are leading to a reduction in the availability of 'young labour' while, at the same time, creating increasing demand for caring skills that are in direct labour market competition with those sought in hospitality and retail. In considering these issues, the chapter aims to provide an insightful discussion on the aesthetics of ageing, examining the impact of aesthetic labour on 'young', 'middle-aged' and 'older' workers and their employment outcomes drawing on a range of organisational examples both in the UK and internationally. In doing so, we

are conscious that attitudes to age are temporally and culturally constructed (Vincent 2006) so that what might have been considered 'old' in the past is no longer viewed as such today or that age and the attributes of age (grey hair) are seen in a very different light in different societies (Vincent 2008). Our analysis is both contemporary and somewhat UK/Western centric, reflecting the dearth of existing literature on this subject in other parts of the world. We acknowledge these aspects as a limitation, while also highlighting how they could inform a future research agenda which we discuss later in the chapter.

Defining Aesthetic Labour and the Importance of 'Looking the Part'

The genesis of the concept of aesthetic labour lay in a job advert in the 1990s for bar staff at Whispers, a nightclub in the North of England. The advert suggested that experience was not necessary, and instead, that Whispers were seeking staff who were required to be 'attractive'. This requirement to look a certain way, while not a wholly new development (see Nickson et al. 2001) is one which is becoming ever more prevalent in the hospitality and retail industries. Many organisations in these industries are seeking to create a particular brand image and employees are increasingly expected to embody this brand image. Research undertaken in Glasgow in the late 1990s sought to assess how hospitality and retail employers were increasingly seeking a 'fit' between their brand image and their employees, something that to a large extent was determined by their physical appearance giving rise to the concept of aesthetic labour. The term aesthetic labour is analytically complex and a full working definition can be found in Warhurst et al. (2000). Here, it is enough to note that companies employ people with certain capacities and attributes that favourably appeal to customers' visual or aural senses and which are sought through recruitment and selection processes and then, once employed, further developed through training and/or monitoring. In Warhurst et al. (2000), it is acknowledged that aesthetic labour is most apparent at the level of physical appearance, though in reality, it was also recognised that the 'embodied capacities and attributes' which organisations were seeking went deeper than physical appearance alone and in reality, aesthetic labour was conceptualised as encompassing elements such as class, gender, race, age and weight.

Since the emergence of the concept of aesthetic labour, there has been further development of the concept by the so-called Strathclyde group as well as others, both in the UK and internationally (see, e.g. Hall and Van Den Broek 2012; McIntyre Petersson 2014; Nickson et al. 2003, 2005; Pettinger 2004,

2005; Warhurst and Nickson 2007; Williams and Connell 2010). The initial pilot research reported in Nickson et al. (2001) had a particular focus on what they termed the 'style labour market', for example, upmarket fashion retailers or boutique hotels, where it was suggested the aesthetic demands of employers was most pronounced. Indeed, as Williams and Connell (2010: 353) note with regard to upmarket retail outlets, 'what distinguishes upscale retail jobs is the weight that managers in these stores place on hiring people with the "right look" – to the exclusion of almost all other qualifications', with arguably this right look often been best embodied by younger workers. Beyond the style labour market though, Nickson et al. (2001, 2005) also found evidence of less style-driven organisations still having prescriptions around employee appearance in support of their brand image.

Consequently, and reaffirming our earlier point about 'fit' between the brand image and employee, Nickson et al. (2003: 190) suggest that, 'it is important to note that all organisations have an aesthetic appeal but the form of aesthetic being offered may vary from one type of service organisation to another'. For example, Williams and Connell (2010) note the manner in which retailers seek to match their workers with the retail setting, noting how 'workers at J. Jill and Coldwater Creek look like the 30-something suburban white women in their catalogue ... and those at Williams-Sonoma appear to be minions of Martha Stewart' (p. 357). Likewise, research by Gruys (2012) on a plus-size clothing store found that plus-sized women were preferred over standard-sized women for sales jobs in order to embody the brand image and for their ability to interact sensitively and empathetically with plus-sized customers.¹ On the more specific issue of age, Foster and Resnick (2013) cite research which shows that older consumers often liked to be served by older staff. Indeed, Davies and Chun (2012: 677), drawing on 'self-concept theory', recognise 'that customers tend to prefer products or services that are congruent with one or more aspects of actual self-concept', and consequently suggest that 'employing staff with a similar age to ones customers would be beneficial'. Thus, Foster and Resnick's (2013) case study of a UK health and beauty retailer recognises the importance of age and gender in the service encounter such that customers seek to 'mirror' their own age/gender when approaching staff for help. As Foster and Resnick further note, 'staff who share the same appearance as customers, may, therefore, represent a competitive advantage for retailers and yet this represents an interesting dilemma for retailers' (p. 244). This dilemma acknowledges concerns around equality, a point which the chapter considers later in greater detail. It is also important to

¹ Plus-size in this context indicates those who are US sizes 14–28 (UK equivalent sizes would be 16–30).

recognise the manner in which a number of the elements noted above, such as class and gender, intersect with age in terms of the ‘ideal worker’ which service organisations are seeking. Consequently, as MacDonald and Merrill (2009: 123) note, in considering customer-facing service jobs, ‘race, gender, class and age coalesce in different job settings to create a norm of the worker who will “look the part” given a particular service’. For example, depending on the desired brand image, there might be an expectation that such a worker is young, white, female and physically attractive, young, male and middle class or older, male and looking like a tradesman and so on. In this way, we can begin to appreciate that being young does not axiomatically bestow advantage in the service sector labour market. McDowell (2009), for example, points to the particular challenges facing young working-class men in gaining employment in the interactive service sector, a point we return to later in the chapter.

As much of the discussion above has highlighted, aesthetic labour has led to concerns about equality and fairness with regard to who can access entry level, front-line jobs in hospitality and retail. In that sense, a key feature of much of the research conducted by the Strathclyde group and others has been the way in which aesthetic labour can create exclusionary employment practices in terms of who is deemed to be appropriate to best represent a company’s desired brand image, particularly when examining initial entry into organisations. Consequently, Warhurst et al. (2000: 11) note, ‘in many respects it was in the area of recruitment and selection that the notion of aesthetic labour has the most resonance, as this process allows for the filtering out of “inappropriate” people’. In part, this filtering out of ‘inappropriate’ people is explicable by the continuing reliance in many hospitality and retail companies of informal recruitment methods. Thus, although the surveys of hospitality and retail employers reported in Nickson et al. (2005) and Nickson et al. (2012) found evidence of formal recruitment methods, such as advertisements in the local press and use of job centres, they also found widespread use of more informal methods. For example, Nickson et al. (2005) found that two-thirds of employers used word-of-mouth referrals and half recruited employees they met as casual callers. Part of the reason for the use of these informal methods, Nickson et al. suggest, is because such methods are inexpensive. Additionally, it is also argued that beyond the cost factor, methods such as casual calling also allow for the filtering out of those who are deemed not to embody the brand image.

In a similar vein, the work of Gatta (2011) and Williams and Connell (2010) examining high-end US retailers highlights the manner in which employers often make decisions about potential employees based on first impressions. For example, Williams and Connell recognise it is common

for managers to approach people shopping in their store to ask them if they would like a job there, a practice that is particularly common in fashion retail. Gatta similarly reports how the fashion retailers she studied would often make 'blink' decisions when faced with hiring new employees. Gatta describes this 'blink moment' as the manner in which 'two second blink' decisions are made with limited information and evidence. In the context of recruitment and selection in fashion retail, Gatta recognises how this "blink" moment was quite evident in hiring employers' hiring decisions and almost all employers reported that prospective workers had to pass a "first impressions" hurdle' (p. 59). The potential for such an approach to rely on obvious stereotypes, be prejudicial and biased is, suggests Gatta, obvious.

A further point to consider is what is being sought at the point of entry into the organisation. The surveys of hospitality and retail employers reported in Nickson et al. (2005, 2012) suggest that at the point of entry into organisations, 'soft' skills, encompassing both the attitude and appearance of employees, are far more important to hospitality and retail employers than qualifications or 'hard' technical skills. There is an obvious issue in terms of the potential subjectivity for judging these 'soft' skills and relatedly the extent to which they may be socially constructed as being about young employees. Weller (2007), for example, in noting the manner in which age-related exclusion to employment is likely to vary from occupation to occupation nevertheless recognises that in interactive service occupations, such as those found in hospitality and retail, recruiting people based on ascribed skills, rather than technical skills, is especially prevalent. Consequently, as she further notes, the reliance on ascribed skills in the recruitment process in interactive service work suggests that often such skills will be 'based on a combination of physical attributes and youthful outlook' (p. 431), a point which we now consider in greater detail.

Age and Aesthetic Labour in the Hospitality and Retail Industries

An obvious point to note in considering the age profile of hospitality and retail is that young people are prominent within these industries. For example, in hospitality, just under half of the workforce is under 30, with 31 per cent of the workforce aged between 16 and 24 (People 1st 2013). Younger workers are particularly likely to work in front-line positions with the average age of waiting and bar staff being 27, compared to back-of-house positions such as cooks (45) and room attendants (45). Only 13 per cent of the workforce are

aged between 50 and 59 and only 6 per cent are over the age of 60 (People 1st 2010). Similarly, within the retail industry, more than 30 per cent of employees are aged between 16 and 24 years old, compared to 13 per cent across the economy as a whole (Green et al. 2014). Again, the vast majority of these younger workers work in front-line positions such as sales assistants and checkout operators. Related to the discussion above is the important recognition that a significant part of the hospitality and retail workforce consists of students, who are an increasingly important segment of the labour market in these industries. Students are prepared to work for low wages and be flexible in their working patterns (Canny 2002), creating what Curtis and Lucas (2001) describe as a ‘coincidence of needs’ between employers and students. Thus, nearly three-quarters of all students who are working are employed in the retail and hospitality industries and the vast majority of students who are working do so in front-line jobs such as sales assistants, waiters/waitresses and checkout operators (Canny 2002; Curtis and Lucas 2001). It is not just the flexibility of students though that is welcomed by employers and a number of studies have also pointed to them as being ‘good’ employees in terms of offering appropriate ‘soft’ skills, including often having the required aesthetic labour and what Hochschild (1983: 95) has described as ‘outgoing middle class sociability’, or more generally, ‘middle classness’ demanded by employers (Warhurst and Nickson 2007; Williams and Connell 2010). The above discussion is useful in recognising that, in part, the reliance of younger workers in hospitality and retail is simply a structural one, reflecting the nature of the labour market for entry-level, front-line positions in these industries. Beyond this point, though, it is also important to again reaffirm the extent to which employers seek to recruit a particular age profile as a result of seeking a ‘fit’ between the brand image and the employees that represent that brand image.

Much of the above discussion highlights the manner in which implicitly and, often times explicitly, many companies in the hospitality and retail sector make clear their preference for younger workers to fit their brand image. Unsurprisingly then, the majority of research which considers aesthetic labour has tended to highlight that employers in hospitality and retail are particularly seeking young workers as a means to best reflect their desired brand image. For example, within the hospitality industry in the style-driven hotel—Hotel Elba—studied by Nickson et al. (2001), the hotel was seeking waiting staff that best fitted the hotel’s look. This look was described by the human resource manager of the hotel as ‘not an overly done up person … but neat and stylish … young, very friendly … people that look the part … fit in with the whole concept of the hotel’ (cited on p. 180). More specifically, the hotel produced a job advert which contained a picture of a physically attractive young woman

(in reality, a model) who was felt to best represent the desired brand image and ‘ideal’ employee. Unsurprisingly then, the desired employee for the hotel was described, for both men and women, as ideally a graduate aged between 19 and 25.

A further example from the hospitality industry can be found in Hooters, the American restaurant company, which serves as a good example to reflect the earlier point about how age will often intersect with other individual characteristics, in this case being female and ‘good looking’. Thus the company has a very particular brand image which is premised on the recognition on its website that: ‘Yes we have a pretty face. And sex appeal is part of our thing’. That face is embodied by the so-called ‘Hooters Girls’, or more prosaically the waitresses in the restaurants, who are expected to embody the ‘Florida Beach Girl look’ (Golding 1998), which is the corporate image projected by the company. The company states that the Hooters Girls are ‘the cornerstone of the Hooters concept’. Indeed, Golding notes how the company ‘unashamedly uses nubile young waitresses dressed in skimpy tops to attract customers’ (p. 7). The company has a uniform of short shorts, and a choice of a tight tank top, crop or tight T-shirt with the intent of projecting an image of ‘sexy’ waitresses. The company unashamedly recognises the maxim that ‘sex sells’. It is also instructive to note that Hooters’ corporate strategy has survived a challenge in the American courts, which upheld the company’s right to promote itself on the basis of ‘female sex appeal’ (Prewitt 2003) and thus to recruit only young, good-looking women to be waiting staff.

In the retail industry, again, there is much evidence of certain retail organisations specifically seeking younger workers. Pettinger (2004), in her work on aesthetic labour in high-end fashion retail, found that ‘workers at such stores are not only fashionably dressed, they are young, usually slim, with “attractive” faces’ (p. 178). Similarly, Gatta (2011) recognises how she was recruited to work as a ‘Besty’s Girl’ in the eponymous dress boutique where she worked as she fitted with the company image being a young, white middle-class girl who was friendly, energetic and would look good in the clothes sold in the shop. Perhaps the most famous retailer though for recruiting a particular aesthetic for their front-line staff is the American fashion retailer, Abercrombie & Fitch (hereafter A&F). The company has been well known for its overt approach to recruitment and selection, articulated in its ‘looks policy’, to ensure that their employees embody the desired brand image. This brand image is unashamedly about the creation of a look which is representative of a ‘youthful All-American lifestyle’ (Mohamedbhai 2013). What is interesting is the manner in which the company, much like with the example of Hooters that we discussed above, has, until very recently, been unapologetic about this image. For

example, in a newspaper profile, the then chief executive officer emphasised that the brand image was about ‘youth and sex, creating an idealised image of clean-cut, frat-boy hunks, and a conventional, cheerleader-type look for girls’ (Saner 2012). The consequences of such a look are nicely captured in the description by Williams and Connell (2010: 357) of the interior of an A&F store in which ‘a well-toned and muscular young worker stands shirtless next to a huge poster that could be a photograph of his chest’.

What is interesting about A&F is the manner in which this look has been challenged as discriminatory in a number of ways, with the exception being any challenges based on age. For example, Fleener (2005) discusses how, in 2004, the company agreed an approximately \$50 million settlement with a number of plaintiffs from minority ethnic groupings, including African Americans, Latinos and Asian Americans. These plaintiffs either failed to get jobs or were excluded from sales floor positions as their natural physical features did not represent the company’s conception of ‘natural classic American style’. It was argued by the plaintiffs that the ‘A&F look’ was ‘virtually all white’ and as Corbett (2007: 155) notes ‘these plaintiffs succeeded when the attractive look the employer was seeking was not just pretty, but pretty and *white*’ (emphasis in original). In a similar vein, in a UK store, an employee with a prosthetic arm claimed that she had been forced to work in the store’s stockroom because she did not fit the company’s strict policy on appearance. Although the employment tribunal ruled that she did not suffer from disability discrimination, they did nevertheless award her £8000 for unlawful harassment (Saner 2012). Most recently, the company has faced a number of claims of religious discrimination with regard to a number of young Muslim women who were either sacked or not hired due to them wearing a hijab (Roberts 2015). Clearly, then, A&F’s adherence to such a strict ‘looks policy’ has contravened existing legislation around ethnicity, disability and religion. Given this situation, it might seem surprising that no cases have been brought forward under age discrimination. Indeed, as Mohamedbhai (2013) notes:

Abercrombie’s branding and marketing gives rise to an equally obvious and sinister age discrimination problem. If the company’s employees are brand representatives, and the company’s brand is clothing for the ‘youthful All-American lifestyle,’ then older workers will be naturally and predictably excluded.

To further emphasise this point, Mohamedbhai suggests that the company’s ‘potential for systematic age discrimination’ is highlighted by internal company documents, including guidelines for appropriate clothing for front-line staff which is exclusively illustrated with noticeably young workers and by the

wording of guidance provided to managers which suggests that they should only employ people who are ‘energetic, dynamic, vigorous’ and with ‘a lively personality’. There is also an expectation that employees must be ‘extroverted, fun, friendly, active, and social’. As Weller (2007) recognises, what could be age-neutral recruitment criteria are often socially constructed to be associated with youth and arguably this description of the ideal employee in A&F could be seen as clearly describing younger employees.

As noted above, though, it has recently been reported that A&F intends to move away from their overt focus on looks and a letter sent to regional and district managers in the company noted that (Jung 2015):

Abercrombie & Fitch will recruit and hire the best associates whose focus will be on offering our customers an excellent in-store experience. We will not tolerate discrimination based on body type or physical attractiveness and will not tolerate discrimination in hiring based on any category protected under the law.

It remains to be seen what, in practice, the reality of these public pronouncements will be with regard to the company’s approach to recruitment and selection. Indeed, there is some debate as to whether this decision reflects a sudden recognition of the ethical considerations of such a hiring policy or merely an attempt to reverse a decline in sales.

Notwithstanding the company’s recent pronouncements, the long-standing marketing, branding and employment strategy of A&F would seem, on the face of it, to be contravening age discrimination legislation and unlike the aforementioned case of Hooters, there would seem to be a greater chance of a legal challenge potentially being upheld. In that sense, Hooters survived the challenge in the American courts by the Equal Employment Opportunity Commission by arguing that the basis of the company brand is ‘female sex appeal’ and that this denotes a Bona Fide Occupational Qualification (BFOQ) (see Malos 2007). Indeed, it is important to recognise that organisations can prescribe the appearance of employees if such prescriptions are based on the branding and marketing of the organisation as part of its business plan and do not transgress existing discrimination legislation. Clearly then, employers *do* have a legal right to set out aspects around appearance, either expressly or implied within a contract of employment, as long as this does not transgress the protected characteristics covered by employment law, which, of course, include age. Thus there would seem to be a potentially interesting argument to be had about the extent to which the likes of A&F and other retail or hospitality companies could claim that insistence on youthful front-line staff is a

strong enough business argument or BFOQ to effectively discriminate on the basis of age (see Davies and Chun 2012).

It is not just in the advanced economies though of the USA and UK that many hospitality and retail organisations seemingly place a particular emphasis on employing young employees. Work by Hanser (2007) and Otis (2008) sheds light on how this process is equally pronounced in the emerging service economy in China, particularly in the hotels and retail outlets that are servicing the burgeoning numbers of wealthy Chinese customers and international travellers. For example, Hanser (2007) found very different expectations about the type of employee working in the retail industry in China, depending on whether a department store was state owned or privately owned. The state-owned store she studied largely catered to a working-class clientele, and accordingly, was staffed by largely middle-aged, working-class women. By contrast, the luxury store, which catered to the burgeoning and increasingly wealthy middle-class Chinese and international customers, employed a workforce of young women, with most being under 30 (as the store only allowed young women to continue working as saleswomen up to the age of 30). In the latter store, Hanser notes how the rich, upwardly mobile customers were served by what are described as, 'an army of obedient, attractive young women' (p. 425). These prescriptions around age were explicit and at the point of recruitment, workers 'had to meet strict requirements in terms of age (25 or younger at time of hire), education (high school or higher) and appearance' (p. 426). In a similar vein, Otis (2008) reports that within the two luxury hotels she studied, most front-line workers were female high school graduates, who were aged from 17 to 28. Otis also notes how these young women were overtly sexualised by the company, by the use of sexualised uniforms, including French maid outfits and brocaded, thigh revealing, traditional Chinese dresses. She also recognises how unsuccessful applicants were rejected if they were 'too short', older than their late 20s or not deemed sufficiently attractive.

Given the preference for youthfulness and arguably 'middle classness' that is suggested by much of the research above, it is worth briefly considering the case of young working-class men. It is often suggested that their inability to secure and maintain service employment in the contemporary economy will often be related, to a large extent, to their inappropriate embodiment. McDowell (2009) suggests for young working-class men, whose fathers usually worked in manufacturing, their labour market opportunities will often be restricted to jobs in areas such as hospitality and retail. However, such working-class men will often find that employers in these industries find these, 'stroppy, macho, often awkward young men' (*ibid.*: 194) are less appealing

than young women from the same class, working mothers, migrant workers, and increasingly, as we have noted above, middle-class students of both genders. Thus, ‘fit and healthy young [working class] men may now be counted among the culturally oppressed, as their embodiment, their looks, their stance, their embodied hexis, seem threatening to potential employers and customers’ (McDowell 2009: 194). This is an interesting point in highlighting that being young does not axiomatically bestow advantage in the service labour market. It is not just young working-class men though that would seem to be disadvantaged in securing work in the service sector.

The disadvantage that is faced by young working-class men in accessing entry-level service work is equally true to some extent for older employees, despite legislative attempts to address this issue. It is only relatively recently that in policy terms, the UK government has sought to encourage greater labour market participation by older workers through, first, the outlawing of age discrimination in 2006, and more recently, by removing the default retirement age in 2011. Ostensibly, such legislation would seem to suggest that organisations should adopt an age-neutral approach to the recruitment and selection of their employees. However, the attitudes expressed by Michael Gottlieb in the early 1990s, which we noted at the outset of the chapter, still seem to be prevalent in large parts of the hospitality and retail industries, as much of our discussion above highlights. Additionally, a recent study by Metcalf and Meadows (2010) found that awareness of age discrimination was lowest within hotels and restaurants, with the same study also finding that equal opportunities policies covering age were least common in the sector. Consequently, they suggest that organisations in hospitality may need targeting to improve their age-related policies and practices. More generally, the same study also found continuing illegal practices within recruitment. For example, 2 per cent of establishments normally included a preferred age range in their advertisements—something that is now illegal with age discrimination legislation—while 42 per cent sought information on age in the recruitment process and 28 per cent made age information available to recruiters. These findings perhaps reflect the negative views which have often been held towards older workers. Research on older workers has revealed that they are often perceived as not having relevant skills, being inflexible and reluctant to change, have low productivity, find it hard to adapt to new technology and have difficulties in keeping up with the speed of work (Jenkins and Poulston 2014). Many of these perceptions, the Chartered Institute of Personnel and Development (CIPD) (2012) has recently suggested, are ‘myths’, which are not substantiated by research evidence, but they still retain the ability to shape attitudes to older workers.

This prejudice and discrimination towards older workers seems surprising, given the widespread recognition of demographic trends which suggest the challenges arising from an ageing population. For example, a recent report from the CIPD (2012) notes that the UK is running out of workers and although there are likely to be around 13.5 million job vacancies in the next ten years, only seven million young people will leave school/college. The most recent *Working Futures* report from the UK Commission for Employment and Skills recognises that the service sector will continue to be the main engine of jobs growth in the UK and that caring, personal and other service occupations and elementary occupations (occupational categories that cover front-line work in hospitality and retail) will continue to grow, while other occupational groups decline (Wilson et al. 2014; and for a discussion of similar trends in the USA, see Hayutin et al. 2013). It seems reasonable to assume that within this context, older people will be one, if not the, main source of currently untapped labour to potentially fill these jobs (see, e.g. Altmann 2015; People 1st 2014). Indeed, it has recently been suggested that within the UK, approximately 1.2 million people who are aged 50+, and are seeking employment, currently do not have a job (The Prince's Initiative for Mature Enterprise 2014). For this resource though to be used, it seems there is still some way to go to change attitudes about older workers who often still face outdated stereotypes when it comes to recruitment. Consequently, the CIPD (2012) suggests that managing a healthy ageing workforce requires employers to move away from 'stereotypical thinking –both conscious and unconscious – about age and what people can or can't do' as such 'thinking influences the way people at work are managed and the way people themselves behave' (p. 6). Such prescriptions remain challenging, and as Jenkins and Poulston (2014) note, age discrimination is arguably the least recognised and acknowledged prejudice in modern society. Indeed, writing in an Australian context, Weller (2007) suggests that employer discrimination is the single most important factor for older workers not gaining employment. In the USA, for example, recent research suggests that 64 per cent of workers aged 45–74 had experienced age discrimination, with workers in their 50s the most likely to experience discrimination (Grossman 2013). In a similar vein, age is the most widely experienced form of discrimination in Europe, with people over 50 feeling that employers will prefer to hire a person in their 20s rather than an older person (LRD 2011). For older workers, it can be especially difficult to gain a new job, especially once they are over 45. In that sense, it is perhaps no great surprise that recent research in the UK found that people aged 50–64 are more likely to be long-term unemployed, with nearly half of those unemployed aged 50–64 having

been unemployed for longer than one year, compared with 30.6 per cent of those under 50 (Metcalf and Meadows 2010).

Notwithstanding the challenges potentially facing older workers in securing employment in industries like hospitality and retail, it is also important to consider research which highlights some of the more positive views of older workers in these industries. In this regard, work undertaken by Qu and Cheng (1996) in Hong Kong and Magd (2003) in the UK is useful to appreciate how older workers can be seen in a positive light within hospitality workplaces. This research suggests that employers may see older workers in a more positive vein due to low absenteeism, fewer accidents, low turnover rate, being motivated, hard-working and diligent, having a sense of responsibility, good communication skills and credibility with customers. Support for these points can also be seen in the examples of McDonald's and Wetherspoons, who have been highlighted for their willingness to employ older workers (DWP 2013). For example, although McDonald's is tended to be associated with a younger workforce, they also employ older workers recognising the manner in which their social skills are highly appropriate for service operations. A survey of managers in the company found that they felt that older workers enhanced customer satisfaction due to their ability to empathise and connect with customers and their ability to go the extra mile to deliver good-quality service. Indeed, it was found that levels of customer satisfaction were 20 per cent higher in stores that employed staff aged 60 and over as part of a mixed-age workforce. Similarly, Wetherspoons is another company who is actively seeking older workers. The company stopped using a retirement age in 2006 and pub managers are trained to ensure that in recruiting staff, they do not discriminate based on age. In recruiting older workers, Wetherspoons see such workers as having valuable skills and experience which allows them to empathise with customers due to their broad range of experiences and often command greater respect from customers. The company also feels that it is important that having older workers allows it to reflect its customer base.

Within the retail industry, again, there is some evidence of employers having more positive views of older workers. For example, within the USA, retail is one of the industries identified as being most likely to employ workers aged 55+ (Hayutin et al. 2013). Indeed, within the USA, of the top 15 jobs held by those workers over 65 and those aged 55–64 retail sales people is, respectively for each group, third and eighth (Grossman 2013). There is also evidence of companies seeking an older workforce demographic which fits their brand image. For example, although as we noted above, around a third of employees in the retail are aged from 16 to 24, the UK retailer Marks and Spencer, which

arguably appeals to an older customer base, has over a third of its employees aged over 50 (DWP 2013). In a similar vein, the home improvement retailer, B&Q, has been widely acknowledged as proactively seeking to employ an older workforce. For example, Foster (2004) notes how the company found that older staff are more likely to own their own home and to have carried out home improvement, so consequently are perceived by customers as being better placed to offer appropriate advice for home improvements. Indeed, Foster recognises how nearly a fifth of B&Q's workforce is over 50, with some stores being wholly staffed by over-50s (Public Health England 2014). Foster (2004) recognises how many of the front-line staff in B&Q were retired ex-tradesmen who in addition to having a high degree of technical knowledge, were also felt to 'look the part'. Thus, in her focus group research with customers, it was found that older male staff were perceived to have more knowledge, which enables them to offer trusted advice on home improvements.

Towards a Future Research Agenda

Having examined the issue of aesthetic labour and age in the hospitality and retail industries, this section of the chapter briefly considers a future research agenda as, to date, there is a surprising lack of research which explicitly considers this issue. A key point in any future research agenda is the need to recognise the triadic nature of the service encounter which highlights the need to do research with managers, employees and customers. Indeed, it is interesting that of the limited amount of research which has specifically considered age and appearance in front-line service work, the recent work by Davies and Chun (2012) on the influence of age stereotyping on customer evaluations of corporate brands in fashion retail and Foster and Resnick (2013) on age and gender in the service encounter in a health and beauty retailer both include customers in their research design. Both Davies and Chun and Foster and Resnick also make the important point about how certain service environments could arguably be seen as age neutral, offering the example of supermarkets as one such environment. This is an interesting point and would suggest that a fruitful way forward to begin to more explicitly consider age and aesthetic labour is consideration of the particular service environment. We would argue then that further research could usefully consider the extent to which discrimination may vary depending on the product being sold. Thus, when examining age discrimination in service workplaces, the impact of industry (e.g. retail and hospitality), sub-sectors within the industry

(e.g. electrical retailer vs. fashion retailer or style-driven boutique hotel vs. a mid-market branded hotel), product market (e.g. high-end and low-end) and departmental differences (e.g. back-of-house jobs and front-line jobs) are all worthy of further exploration to further illuminate this issue. Additionally, the relationship between age and other personal attributes, such as gender and ethnicity, is worthy of further research with Davies and Chun (2012) highlighting that in the context of service businesses, female employees are more likely to be affected by age stereotyping than male employees, for example. Furthermore, as we noted in our introduction, attitudes to age are culturally constructed and thus there is also considerable scope for further research to see how these issues play out within different institutional and cultural contexts. Although the chapter offered some limited evidence of a similar reliance on young women in the burgeoning upmarket Chinese hospitality and retail industry, clearly there is significant scope to examine attitudes to older workers in other emerging economies.

Demographic and economic changes, particularly an ageing population, in many developed countries are driving shifts in the composition of the workforce. This has resulted in a 'perfect storm' through the coalescence of, *inter alia*, a declining youth workforce available to the service sector (Baum 2010); increased demand for skills attendant on eldercare as populations live longer; and, finally, the consequences of the pensions crisis (Casey 2012) that has forced many people to remain in the workforce for longer. As a result, organisations historically able to select employees on the basis of aesthetic criteria may well be forced to modify their expectations and accommodate older workers within their teams. Systematic and longitudinal monitoring of such change will constitute an important and fruitful future research theme.

One final point to consider is, moving beyond more traditional research approaches, the potential use of visual methodologies in assessing views of employee age and aesthetic labour. In that regard, the recent work of Harris and Small (2013) on obesity and aesthetic labour in the hotel industry provides a useful template for such research. In this work, the authors analysed over 100 images in online promotional videos of hotel staff and found that none portrayed a person of a size considerably overweight or obese, and instead, 91 per cent had a slim build, with only 9 per cent being slightly larger. It is also noteworthy that of these slightly larger staff, almost all of them were older Caucasian men. It is easy to see how such an approach could also usefully shed light on how other hospitality and retail employers present their brand image through marketing and recruitment literature, as our earlier discussion of A&F highlights.

Conclusion

In spite of age legislation in the UK and elsewhere, there appears to be continuing discrimination facing older workers seeking employment. This chapter has examined this issue within the context of the hospitality and retail industries. In particular, the chapter has considered how the increasing emphasis placed by companies in these industries on their employees' appearance or aesthetic labour has the potential to exclude older workers from front-line positions. In part, as we acknowledged in the chapter, the manifest reliance on younger workers is a function of the labour market for which companies draw for front-line positions. Over and above this point though, there also appears to be evidence of a number of hospitality and retail companies deliberately seeking to employ younger workers in support of their brand image. Thus, it is clear that the bulk of extant research on aesthetic labour has highlighted a preference for younger workers to best embody the brand image in hospitality and retail, although we did also note a smaller number of examples in which companies were seeking older workers to best fit their brand image—most obviously, B&Q. Equally, it is clear that there are a large number of age-neutral service environments where, in theory, age should be of no consequence in the recruitment and selection process. Such a view would also recognise the business case for ensuring an appropriate range of employee ages to reflect a broad customer base. That said, in suggesting a future research agenda, more research is required to examine this issue to better highlight the potential for unconscious bias towards older workers by hiring managers in the hospitality and retail industries and how this bias might be addressed (and see Altmann 2015; Jenkins and Poulston 2014). This research would seem essential in light of the discussion of the widespread use of informality and the 'blink' moment in recruitment and selection discussed in the chapter (Gatta 2011).

What is clear though from our discussion is that older workers will become an ever more important part of the labour market in future years due to demographic changes. As the reduction in the availability of 'young labour' continues, hospitality and retail companies will find themselves competing for older workers with sectors like social care, who with an increasing demand for caring skills, are set for continuing growth (Wilson et al. 2014). While such a scenario means that it is unlikely that the likes of A&F and other style-driven organisations will suddenly start recruiting older workers for many other hospitality and retail companies, who are perhaps far less stringent in their looks policy, there may be an increasing recognition of the necessity, and indeed the benefits, of employing older workers.

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23

Gender, Age, and Labour Market Experiences

Caroline Murphy and Christine Cross

Introduction

Labour market demographics in much of the industrialised world are changing; workforces are ageing (Truxillo and Fraccaroli 2013), while at the same time, the workforce participation of women is increasing (Thevenon 2009). Such changes mean that the workforce has become more diverse. Linked with that, organisational interest in, and awareness of, the need for diversity management and equality has also increased as the impact of stereotyping and unequal treatment of particular groups is increasingly understood. Stereotyping and biased decision-making on the basis of an individual's characteristics (e.g. age or gender) can have a profound impact on their labour market and workplace experiences. Furthermore, the stereotyping of particular groups plays a significant role in occupational segregation (both horizontal and vertical). While gender equality in the workplace has received significant attention for some time, and a rich body of literature exists on gender and labour market experiences, much less attention has focused on the impact of the combination of gender and age on worker's labour market experiences during their working lives.

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In this chapter, we aim to contribute to that discussion by highlighting the impact of the combination of age and gender on workers' labour market experiences at various points of their working lives or career stages. It is important to look at both age and gender concurrently since labour market experiences are shaped by a multitude of factors, not merely one. Indeed, Risman (2004: 442 cited in Shields 2008) argues that "there is now considerable consensus growing that one must always take into consideration multiple axes of oppression; to do otherwise presumes the whiteness of women, the maleness of people of colour, and the heterosexuality of everyone". Within this chapter, we take on board this view, and focus in particular on how factors related to age combined with one's gender play a critical role in shaping work and labour market experiences, in particular for women. Biased decision-making (be that related to age and gender) with regard to hiring decisions, assessments of performance and opportunities for advancement form a critical part of this. The chapter is structured as follows: first, we outline the importance of intersectionality and the consideration of multiple facets of demographic characteristics concurrently when looking at life experiences. We illustrate the value of cumulative inequality theory in this regard. We then examine the interplay of age and gender from the perspective of occupational segregation in the labour market. In doing so, we highlight the impact of age and gender across the life course in terms of work experiences. Finally, we offer some suggestions for future research on the intersectionality of gender and age, as well as the implications of managing the needs of a diverse workforce inclusively.

Intersectionality and Cumulative Inequality

Intersectionality refers to the overlap or intersection between social identities and related systems of oppression, domination or discrimination. Crenshaw (1989) developed the work on intersectionality arguing that civil rights laws could not fully address the types of inequality and discrimination faced by people who suffer multiple, or 'intersecting', axes of discrimination. Intersectionality theory suggests that diversity categories, for example, gender, race, sexual orientation and age, interact on multiple and often simultaneous levels. Shields (2008) refers to the growing importance of intersectionality within feminist theory and an understanding of gender. Indeed, combined, an individual's age and gender has the potential to advantage or disadvantage them significantly in various situations such as job seeking and career progression.

Cumulative inequality theory is a useful framework in terms of identifying the interplay between age and gender in the labour market (Ferraro and Shippee 2009). The theory builds on earlier work of Merton (1968, 1973)

and Dannefer (1987, 2003) which examined how social advantages accumulated over time resulted in a cumulative advantage for certain groups. For example, Merton refers to this phenomenon among scientists, observing that *eminent* scientists receive disproportionately greater credit for their scientific contributions while lesser-known scientists receive relatively little credit for comparable contributions. On the other hand, cumulative inequality theory looks at the reverse phenomenon, accounting for the way in which *inequalities* develop and influence the quality of life of societies, cohorts and individuals. While cumulative advantage theory is premised on the notion of advantage accumulating over time, cumulative inequality posits that disadvantage also has a cumulative effect. The central premise underlying cumulative inequality theory is that inequality generated within social systems manifests over the life course via demographic and developmental processes (Ferraro and Shippee 2009). Social disadvantage ultimately will increase an individual's exposure to risk, while social advantage increases one's likelihood of opportunity. While the theory was originally developed to study aging and the accumulation of inequality, we argue that this theory is particularly useful in advancing our understanding of the impact of the combination of age and gender on a person's labour market experiences. Cumulative inequalities in life courses mean that relatively small individual (dis)advantages at earlier stages can in fact generate larger (dis)advantages at later stages in life (Hillmert 2010). This leads to a situation where disadvantages in early work stages, such as where young girls are choosing stereotypically female careers, combined with the need to care for children during a career, and thus avail of part-time work, combine to create a situation where career progression and wages for young women are less than for their male peers. Based on analysis of the UK labour market, Azmat (2015) found that the greatest gender pay gap between men and women emerge after 25–30 years when workers are in their 40s. This reflects career breaks taken to care for young children and takes into account the average pay in each of the nine major occupation groups and the proportion of women in those occupations.

Duncan and Loretto (2004) revealed that across all ages, women are more likely than men to experience ageist attitudes concerning appearance or sexuality. Indeed, the gender pay gap illustrates a further way in which men and women experience the labour market differently and how these experiences change and multiply with age. A greater awareness of the existence of such attitudes is important in an organisational context. Yet Jyrkinen and McKie (2012) outline that there has been a lack of attention paid to the intersection of gender and age in management and organization studies. Indeed, while occupational segregation occurs in the labour market between older and younger workers, segregation on gender grounds is just

as obvious. In fact, the causal factors associated with occupational segregation occur long before the age at which individuals enter the workforce and often relate to choices made at an early age with regard to subject choice at school, educational path or career type entered. While age, gender or other characteristics are important factors in shaping individual work experiences, intersectionality theory and cumulative inequality theory suggest that the impact of such characteristics should be assessed concurrently, rather than simply on an isolated individual basis. Therefore, we now turn our attention to an examination of stereotyping which is a hugely influential factor on gender and age inequality and occupational segregation in the labour market or within organisations.

Gender and Age-Based Stereotypes and Biased Decision Making

Biased decision-making occurs when we implicitly form an impression of others based on limited information and allow our pre-existing attitudes or beliefs about the group to which they belong to influence our decision-making. Bias has a significant impact on those in the workplace who are identified as belonging to certain age groups and genders, for example, women of childbearing age. Stamarski and Son Hing (2015: 8 citing Berger et al. 1998; Correll and Ridgeway 2003) highlight that according to status characteristics theory, an individual's group membership can convey information about their status and their competence on specific tasks). Therefore, they argue that organisational decision makers will have varying expectations of men's and women's competence levels and job performance (Stamarski and Son Hing 2015: 8). Arvey and Murphy (1998) refer to the phenomenon of demographics-based rater bias whereby employees with certain demographic characteristics receive systematically lower or higher evaluation scores. Studies have shown that managers' performance judgements can be influenced by the gender, race or age of the evaluatee (Murphy and Cleveland 1995). Thus such evaluations can be biased and can be subjectively based on stereotypes related to gender or age, which we discuss below.

Gender Stereotypes

Martell et al. (2012): 137) posit that gender segregation in organisations is "an emergent phenomenon that arises from the collective behaviour of

individuals who express only a small bias in favour of males, in concert with the signals governing promotion decisions and organizational mobility". The practice of stereotyping is at the core of this issue. Stereotypes continue to be a potent barrier to women's careers (Koenig et al. 2011: 616). Rumelhart's (1984) definition of stereotype is a pre-established expectation that an individual forms about others, which allows them, in turn, to reduce their uncertainty about that persons preferences, actions and beliefs. It usefully illustrates how the perception that male characteristics are more suited to certain roles, which continues to exist, can impact on female careers. Schein (2007) argues that stereotyping affects women in two distinct ways. First, females are viewed as nurturers and therefore perceived as less effective in contributing in the workplace domain. Second, Schein argues that the managerial position has been traditionally characterised as a male role (Schein 1973). Thirty years after Schein's initial 'think manager think male' elucidation. Powell and Graves (2003) found that good managers continue to be more often described as higher in stereotypically masculine traits, that is, assertiveness, decisiveness and confidence than in feminine traits such as cooperativeness, communication and supportive behaviours.

Just as views of race, age or ability are multidimensional, a variety of gender stereotypes too prevail. Heilman (2001) proposes that gender stereotypes be classified into two categories. The first classification is descriptive stereotypes. In this view, men are viewed as agentic—aggressive, forceful, independent and decisive, while women are viewed as socially or service orientated, or 'communal', for example, kind, helpful, selfless, sympathetic and concerned about others (Heilman 2001: 658). This can impact on the careers women choose. The second category refers to prescriptive stereotypes, which describe how women should behave, rather than how they do behave. These prescriptive stereotypes are particularly damaging for women due to consistent, preconceived notions that women should exhibit male working styles to succeed. Heilman (2001) further suggests that deviations from the prescribed behaviours of each sex often creates disapproval and negative reactions, in both genders, impacting on both career choice and career progression. Okimoto and Heilman (2012) argue that working mothers in traditionally male positions face additional anxiety due to unfounded assumptions about their competence as employees. Assumptions rooted in gender stereotypes, and furthermore, stereotype-based assumptions can also lead to bias towards these working mothers in family domains, depicting them as bad parents.

It is noteworthy that gender stereotyping impacts on men in the workplace also. Gregory and Milner (2009) highlight that women with dependent children are most likely to take up measures such as part-time working and other

reduced working-hour arrangements. They suggest that a number of barriers appear to limit men's take-up of such measures: the organisation of the workplace (including perceptions of their entitlement, i.e. perceptions that men's claims to family responsibilities are valid), the business environment and the division of work in employees' homes (including the centrality of career for the father and mother and their degree of commitment to gendered parenting). Therefore, the impact of such policies is and will remain quite limited until such time as men are encouraged to avail of such practices and the take-up in both genders improves.

Finally, context is important when considering how gender stereotyping materialises in organisations. For instance, during the course of the global financial crisis, a number of women were appointed to high-profile positions. Ryan et al. (2011) research found that women may be favoured in times of poor organisational performance, not for the reason that they are expected to improve that performance, but rather because they are viewed as good people managers and capable of shouldering responsibility for organisational failure. Recent research on the context in which females are appointed to senior manager positions has lent credence to the idea that a 'glass cliff' exists for females who do make it to senior levels of management. The 'glass cliff' posits that when women achieve high profile roles, these can often be at firms who are in precarious positions (Mulcahy and Linehan 2014).

Age Stereotypes

Just as some roles are viewed as being more suited to males than females, the same is true of age; some roles are considered to be more suited to younger workers than to older workers (Perry and Palaramis 2006). Workplace age stereotypes are beliefs and expectations about workers based on their age (Hamilton and Sherman 1994; Posthuma and Campion 2009). Posthuma and Campion's (2009) extensive review of the literature on age stereotypes outlines that older workers are perceived to have lower ability, be less motivated and be less productive than younger employees. Yet, despite the prevalence of this stereotype, there is a distinct lack of empirical evidence to suggest that job performance declines with age (cf. Cleveland and Lim 2007). Indeed, McEvoy and Cascio (1989) found that job performance often improves with age, and when there is a decline, it tends not to be significant. Overall, the evidence suggests that, at least, 'older workers' can be just as productive as younger workers (Prenda and Stahl 2001 cited in Posthuma and Campion 2009). Research from Duncan and Loretto (2004) revealed that women

experience more age discrimination than men. A recent study from Neumark, Burn and Button (2015) found robust evidence of age discrimination in hiring female candidates, with considerably less evidence of age discrimination against male candidates, suggesting that age discrimination is more profound for females. Indeed, they found that age discrimination starts at a younger age for females also.

While stereotypes may persist, they do not automatically result in discriminatory behaviour, though the persistence of harmful stereotypes and biased decision-making can lead to discriminatory behaviour. Kirton and Greene (2016: 111) point out that age discrimination is a problem for those at both ends of the working age spectrum. Research by Duncan and Loretto (2004) shows that ageism is highest towards workers in the younger and older age categories. Traditional age distributions within organisational structures—younger at the bottom and older in the middle and top—derive from hiring employees at a young age and retaining them within the organisation (Shore et al. 2009). They argue that this age distribution then aligns with societal expectations of age differences between employees and managers, and importantly, the concept of orderly career progression. Swirey and Willitt's (Swirey and Willitts 2012) research, carried out by the Department of Work and Pensions in the UK, showed that individuals were found to display significant age bias towards workers if those younger workers were more senior in an organisation or were their supervisor/manager.

The research discussed in this section provides an illustration of how bias and stereotyping can impact on particular groups of workers—both women and men, older and younger. In light of the theory introduced earlier, cumulative inequality suggests that sources of disadvantage increase over time to leave some groups disadvantaged compared to others. The remainder of this chapter focuses on how stereotyping and bias over time cumulatively impact on women's careers and ultimately contribute to occupational segregation in the labour market.

Occupational Segregation

Occupational segregation refers to the distribution of individuals both across (horizontal) and within the hierarchy (vertical) of jobs, based upon demographic characteristics. In the Western world, the workforce has developed along sex-segregated lines, although the extent of the problem varies from country to country and from job to job. The causes of occupational segregation are widely debated in the literature and have generated volumes of

empirical research and theoretical debate (see, e.g. Anker 1997; Dex 1988; Hakim 1979, 1996). While a detailed examination of the causes of this segregation are outside the remit of this chapter, explanations offered include cultural and societal attitudes, the socialisation process, gender inequality in training and education and the nature of women's career paths (Stier and Yaish 2014). To understand occupational segregation, we need to identify that the concept has its roots in childhood. Research from Iannelli and Smyth (2008) shows that, despite a better understanding of the issue, gender continues to have a strong impact on the subjects that students choose at the second and third level with females opting more strongly for arts and humanities-based subjects whilst males choose science-based areas. The result of this is a perpetuation of the concept of science and technology roles meaning 'male' roles. Traditionally, positions in engineering, physics, the judiciary and legal professions were considered to be 'male' jobs. This streaming of men and women into trades, professions and roles is commonly termed horizontal segregation (Blackburn et al. 2003). Iannelli and Smyth (2008) argue that typically 'female' subject areas tend to be associated with occupations in lower-paid sectors or in areas with fewer prospects of career progression. Certain occupations are viewed as stereotypical roles performed by females in the home and are often referred to as 'women's work'. These jobs are often also assigned a lower value in relation to skill requirements and remuneration (Wirth 2001). Such patterns of gender segregation are often attributed to the sex-role stereotyping of occupations (Miller et al. 2004). As suggested by Cockburn (1991), the concentration of women into insecure, unfulfilling jobs appears to survive wars, economic crises, technological revolutions and labour market restructuring. According to Anker (1997: 1), "occupational segregation by sex is extensive in every region, at all economic development levels, under all political systems and in all diverse religions, social and cultural environments". As a consequence of occupational segregation, women tend to be heavily concentrated into a narrow range of occupations such as catering, clerical, cleaning, educational (especially primary education), hairdressing and nursing (Miller and Hayward 2006).

Indeed, for roles where entry to the occupation is apprenticeship based, we see the gender divide continue also. According to a UK Trade Union Congress report on Apprenticeship and Gender (2008), many schools fail to promote apprenticeships to girls. For example, girls are continuing to pursue apprenticeships in hairdressing while boys are interested in more mechanical roles. There is also little effort made to ensure that young women are aware of gendered outcomes such as sectoral pay differentials when they make choices about which apprenticeship pathways to pursue.

The nature of the labour market has changed significantly over the past two decades, given the nature of globalisation, increased technology and the rise in service and knowledge-based economies. This has resulted to some extent in a change, with an increased presence of women in better-paid jobs and an increased presence of men taking low-wage service industry employment. Despite this, Brinkley et al. (2013): 5) argue that the overall structure of employment remains highly polarised, with men still dominating in occupations traditionally regarded as male (manual jobs) and women dominating in female roles (caring, retail and personal service jobs). One of the most recent changes in the labour market has been the growth of precarious employment. Precarious work refers to forms of work characterised by atypical employment contracts, limited or no social benefits and statutory entitlements, high degrees of job insecurity, low job tenure and low wages (Kalleberg 2011). Fudge and Owens (2006) reveal that women perform a disproportionate amount of precarious work. Where previously, part-time work may have been an attractive choice for many women, across the European Union (EU), there has been a dramatic rise in part-time work of a precarious nature, that is, non-guaranteed hours of employment in both the number of hours offered or the times at which those working hours are required by employers. The International Trade Union Confederation (2011) argued that women were facing higher unemployment, underemployment and reduced working hours as a second wave of the global economic crisis.

While horizontal segregation is a significant issue, we move now to focus on the interplay between age and gender, particularly with regard to vertical segregation in the workplace and the labour market more generally.

Vertical Segregation

Vertical segregation occurs even within female-dominated occupations such as education and parts of the health sector, where men are more likely to hold the high-status, high-skilled and better-paid positions, with women concentrated in the lower-skilled and lower-paid positions (Blackburn et al. 2001). As Adler (1995) has resolutely stated, the single most uncontroversial, indisputable statement one can make about women in management is that there are very few of them. Little has changed since Adler noted that over 20 years ago. An analysis of the statistical evidence on the number of women in managerial positions worldwide highlights that women's increased involvement in the labour force is not paralleled within the management levels of organisations (McKinsey 2015). Interestingly, an international comparison of female

managers is recognised as being difficult to achieve as official national classification systems include differing categories of professional and administration staff within the category of manager (Davidson and Burke 2000). Despite these definitional difficulties, it is clear that women are not progressing into senior managerial positions at comparable rates to their male counterparts. A recent report indicates that only one quarter (26 percent) of senior roles in the EU are occupied by women, which is an all-time high figure (Grant Thornton 2015).

In relation to vertical segregation, one of the frequently cited reasons for women's under-representation in senior roles and the perpetuation of the gender pay gap relates to the extent that females undertake part-time or flexible working arrangements. Cockburn suggests that when women are granted various kinds of work flexibility to enable them to cope with motherhood and other domestic responsibilities, this allows them to be dismissed as 'different' and less serious than male employees (Cockburn 1991: 92). We are concerned here with women between the ages of 18 and 55, where they have the responsibility for both childbearing and child-rearing, resulting effectively in an approach that impacts on the majority of working women. Research by Dickens (1992) has highlighted that various flexibility initiatives such as homeworking or part-time working for women, which are often cited as evidence of an equal opportunities approach, may actually be double-edged, in that they are seen as atypical, because they differ from the male norm. Developments such as career breaks and part-time work, while recognising the current reality of women's lives, in attempting to juggle paid work and unpaid domestic work, can be seen as initiatives which in practice take women out of competition for jobs and thus 'save' full-time jobs for men (Figart 1992: 43). Similarly, Cockburn (1991) suggests that flexibility initiatives also help perpetuate the assumption that women bear the primary responsibility for caring for and raising children, thus impacting negatively on their promotion opportunities. This is evidenced in the Irish situation, where in 2014, women accounted for the majority of employees in the labour market at 51 percent, yet O'Sullivan et al. (2015) found that 17 percent of employees who work part-time and 8 percent of employees who work variable hours do so because of their caring responsibilities. They argue that women require the possibility of part-time work in order to accommodate their caring responsibilities.

In examining the reasons why women appear to have been frustrated in progressing through organisations in a similar fashion to their male counterparts, the 'glass ceiling' is one of the most prevalent and widely known concepts. The concept assumes that women's under-representation at senior management levels is not merely a matter of choice, or one of failure, by

women. Critically, the concept holds that limits on female careers are created by a whole series of structural, institutional and attitudinal obstacles, which prevent women as a gender from progressing to the most powerful organisational roles (Morrison and Von Glinow 1990). A number of theoretical perspectives have also been advanced to enhance understanding of why, in the competition for the most powerful organisational positions, men are more successful than their female counterparts. Singh and Vinnicombe (2004: 479) have employed social identity theory to examine the ‘persistent homogeneity’ of organisational directorates. By applying social identity theory, they argue that people define membership of particular groups such as family, race, gender and organizations by assigning social categories. Consequently, existing senior male management teams would appear to prefer candidates who are similar to themselves. They posit that, because social identity theory holds that performance of similar individuals is seen as higher in the ‘in-group than the out-group’, women, in fact, must exhibit performance over and above that of their male counterparts to succeed.

Gender Inequality in the Labour Market

Uncovering the causes for the dearth of senior female managers and providing ways in which organisations can redress this imbalance has been the subject of much research and debate (see, e.g. Karamessini and Rubery 2013; Davidson and Burke 2012; Singh and Vinnicombe 2004). As a result of the unequal representation of females in senior decision-making roles, be that in political or in business, some countries have grappled with the idea of political interventions (e.g. gender quotas and compulsory paternity leave for fathers) in a bid to improve gender balance in senior-ranking positions. Indeed, Goldin (2014) has pointed out that some positive changes have occurred in sectors such as health and science and technology with regard to this, but change has been less apparent in corporate, financial and legal environments. It is important to recognise that gender inequality continues to be an issue, particularly for women, in spite of the raft of legislative mechanisms that are designed to protect both genders from discrimination.

A further way of explaining the continuance of gender inequalities in the workplace is through the social system perspective. This view posits that social and institutional systems, within which organisations operate, include beliefs about gender and behaviour, which work to the advantage of men rather than women. Chesterman et al. (2005) outline how the long-hours culture in organisations serves to hinder female advancement where understandings of

commitment are based on time–space visibility and the prioritising of work life over home. Indeed, with advancements in technology, the ability to work remotely could be perceived as helpful to women in this regard. However, Chesterman et al. (2005) argues that there are persistent organisational barriers to the concept of the ‘feminisation’ of management such as the intensification of work demands.

Conversely to the glass ceiling concept, there is also a widely held view that females ‘opt out’ of senior management roles and instead are happy to maintain careers at lower levels in organisations. The argument has been made that women choose to opt out of or leave powerful positions in order to spend more time on their caring roles, child rearing, and so on. Consequently, the ‘opt out’ debate has now moved to the ‘lean in’ debate (Sandberg 2013) suggesting that women need to be more proactive and self-directed in seeking positions of leadership and authority until such time as they feel they might want to leave their roles. Sandberg urges women ‘don’t leave until you leave’, suggesting that women have allowed future plans to interfere too early with their careers and job performance. Research has also highlighted that women with children may be choosing to leave organisations as a direct result of what is termed the ‘maternal wall’ (Williams and Segal 2003). This metaphor describes a situation where mothers experience distinctive patterns of gender discrimination, resulting in their decision to leave the workforce. This is a particularly important argument, given that the age or life stage that most women choose to have children can conflict with a critical point in their career; we return to this later in our discussion.

Dual Disadvantage in the Labour Market

According to Lyons et al. (2012), the literature on careers consistently suggests that the nature of careers is changing; careers are becoming less linear and focused on upward progression. Careers are characterised by the pursuit of individual values and movement between jobs and employers. As a result, the link between age and career stage or level is no longer clear-cut. However, to better understand the cumulative inequality faced by women during their careers, the work of Super (1957) is still useful. His framework differentiates between a variety of different stages within an individual’s career. Super (1980) contends that the transition between various career stages is less associated with chronological age, and instead, more closely relates to an individual’s personal circumstances and personality attributes. While it is worth noting that individuals can enter and leave any of the career stages throughout

their career, we are interested in the conventional linear approach to careers to assist us in explaining cumulative inequality. The first stage is the exploration phase during which time individuals are concerned with finding an occupation that they believe they are suited to and will succeed in. As we have already discussed, it is in this phase that decisions around school subject choices are made, with the consequential impact on career choices, particularly for female students. The second phase refers to the establishment of one's career through stabilising and securing one's role. The maintenance phase refers to the point at which one's career is established and they work to maintain their status and role. This stage, although not limited to any specific age category, is one which those in the 25–44 age category are likely to identify with. For women in particular, this is often the phase where women have children, with the associated impact on career. Finally, the disengagement phase refers to the period during which someone prepares to transition from work to retirement, which may involve reducing workload or pace of work and thus features older workers. Again, there is no stringent age category applied here; however, for many of those in a traditional linear career, this phase is unlikely to occur before having a significant number of years in employment.

Figure 23.1 allows us to examine the cumulative inequality framework in combination with Super's career stage theory. This combination assists us in better understanding the dual disadvantage faced by women at the three key age-career stages. At the lowermost of Fig. 23.1, we highlight three of Super's career stages; above we indicate workers' age categories (though we accept that age and career stage need not necessarily be aligned). At the top of Fig. 23.1, we indicate the extent to which it could be argued that age or gender is a stronger inhibiting factor to being successful within that career stage. We contend that, at labour market entry stage, age is particularly salient as an inhibitor, since young workers must demonstrate a level of ability/experience in order to

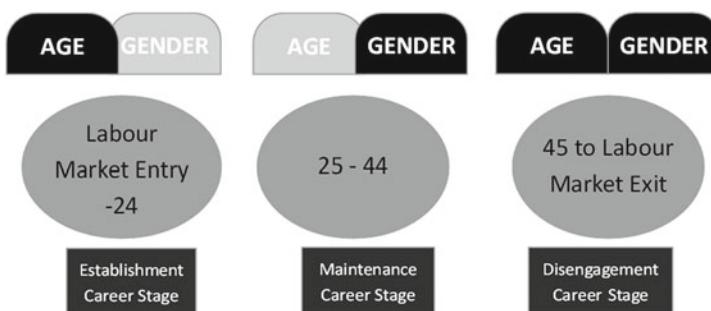


Fig. 23.1. Age, gender and career stage

secure a job. They are in a cyclical situation where you cannot get experience without a job and you cannot get a job without experience. Gender is less critical here to the inequalities faced by people in this first career stage.

However, we argue that in the next stage, the combination of age and gender become particularly important as an inhibitor, as women with caregiving duties may struggle to work long hours and therefore may be perceived to demonstrate less commitment to their career. It is accepted that women's careers are more complex than those of their male counterparts, stemming mainly from the traditional role played by women in the home. The resulting work–family conflict is experienced when pressures from work and from family roles are mutually incompatible, such that participation in one role makes it more difficult to participate in the other (Greenhaus and Beutell 1985). It is in this case that balancing the dual roles becomes a concern, particularly for women. It is at this stage also where women are often pressurised into a situation where they need to work part-time in order to meet their caregiving duties. Kirton and Greene (2016: 110) refer to the 'golden decade' between the ages of 30 and 40 as the point at which individuals climb the career in their respective fields, but for women, this is the point at which they are exiting the labour market temporarily to have children or return to work on a part-time basis. It is therefore unsurprising that the glass ceiling for women occurs fairly early in their careers, at around age 40 (Itzin and Phillipson 1995).

Mencarini and Sironi (2010) argue that although the last few decades have seen a progressive increase of gender equality in almost all dimensions of society, roles concerning childcare and domestic work remain highly gender specific, with women carrying out the dominant share. Giddens (1984) has proposed that for women in contemporary organisations, having a family creates significant tensions between, on the one hand, the competitive masculine management norms which operate within most organisations and, on the other, women's understandings of themselves as parents and as female managers. A study by Abele and Spurk (2011) showed that parenthood had a negative direct influence on women's work hours and a negative indirect influence on women's objective career success. In particular, women who had their first child around the time of career entry were least successful over the initial ten years of their career. Men's career success however was found to be independent of parenthood (Abele and Spurk 2011).

Finally, in the last phase, disengagement, the cumulative effect of inequality experienced at earlier stages means that there are few opportunities for women to advance their careers in this stage and if women have not secured senior roles at this point, the chances of doing so at that stage are reduced. At disengagement phase, a perception that an individual will cut back on workload is

expected; therefore, attempting to advance may be made all the more difficult as one must fight against this perception. This leads to a situation where both age and gender work to the disadvantage of a woman in this career stage.

Policy Level Implications

We have seen so far that the intersection of age and gender creates a dual disadvantage in the labour market for women. Brinkley et al. (2013) emphasise that gender segmentation continues to be an important issue at all levels of the labour market, and highlight that this is especially problematic in lower-skilled work. Therefore, they argue that policy efforts to address gender segmentation should be focused at the bottom end of the labour market and intermediaries, in particular educators, should have an important role in encouraging young people to consider a wider range of job and career options in order to reduce gender segmentation. Brinkley et al. (2013) also argue that the provision of more information on opportunities and returns resulting from different qualifications and employment pathways should be made available to both young men and women to help them make informed choices about their future at younger age.

While significant attention has been paid to developing policies targeted towards parents for childcare leave, the older cohort of workers with eldercare responsibilities is growing and leave policies are needed to reflect this, at both an institutional and organisational level. Traditionally, caregiving leave has been viewed as a maternal issue and, while the virtues of extended periods of maternity leave have been lauded for the benefits they bring in terms of childhood development, leave has been found to negatively impact on female careers. Many countries have used enhanced levels of maternity and parental leave as mechanisms to retain female labour market attachment. However, these mechanisms vary between fully paid, part-subsidised and unpaid on a country-by-country basis. Furthermore, even in cases where paid childcare leave is available as a legal entitlement, in some professions and organisations, a perception exists that availing of such policies will inhibit career progression. Improving the uptake of these policies by men has been identified as a mechanism to overcome this. Therefore, a number of countries (mainly Nordic states) have developed childcare leave policies which encourage male take-up. Gregory and Milner (2009) outline how the Scandinavian states have attempted to tackle work-life balance by focusing on reduced working time for both genders. In Scandinavian welfare states, the explicit objective of gender equality means that family-friendly measures target men as well as

women and therefore the perception that such measures will only be accessed by females is dispelled. Lammi-Taskula (2006) has emphasised the importance of these efforts of several European countries to increase the take-up of leave by fathers. This has been driven by the introduction of a ‘use it or lose it’ approach that reserves part of the leave for the father (Ciccia and Verloo 2012). While there is a limited presence of these policies in Europe currently, discussion and interest in such initiatives is growing.

Finally, regarding the growth of precarious employment, we have already noted that precarious work significantly impacts on women. However, it is a phenomenon not limited to female workers; indeed, there is significant evidence to suggest that young workers of both genders are particularly vulnerable to being exposed to precarious working practices (see Murphy and Simms, Chap. 14 for a wider discussion). Therefore, it can be argued that both age and gender are significant demographic factors that require consideration in addressing precarious employment since this is a factor which could contribute to cumulative inequality over time. In Europe, there is an emerging trend to address the growth of precarious work by limiting it to particular age categories. For example, in France, part-time work contracts must provide for a guaranteed minimum of 24 hours work per week (or equivalent in a specified period); however, exceptions are made for people under the age of 26. Similarly in Italy, only workers aged under 25 or older than 55 can be employed on what are referred to as on-call contracts, which are contracts with varying numbers and distribution of hours justified by production peaks and organisational needs.

Organisational Level Implications

In the context of occupational segregation within the labour market generally, there are efforts which employers can take to ensure that within their own organisation, the effects of segregation are limited. One way to address this is to recognise that while a diverse workforce brings many benefits, diversity also requires effective management. Diversity management has been defined as the “the voluntary organisational actions that are designed to create greater inclusion of employees from various backgrounds into the formal and informal organisational structures through deliberate policies and programs” (Mor Barak 2005: 208). Unconscious bias training for employees (particularly management) essentially makes individuals aware of their biases and goes some distance to tackling this by increasing awareness not only that the bias exists, but of the impact of decision-making without recognizing those biases. Hoobler et al. (2014) suggests that combating subtle biases may be as simple

as opening up conversations with managers about stereotypical assumptions, often based in benevolent sexism that managers commonly harbour regarding women's career paths or their attitudes towards ambitious young employees who want to progress at a faster pace. Indubitably, it is in senior level roles where bias on either gender (generally males are more closely associated with senior management) or age (similarly a senior manager is associated with being older than their subordinates) has a strong impact in perpetuating vertical segregation.

Future Research Directions

The impact of this type of cumulative inequality on work experiences is an area that requires further study. Many studies have focused on the effects of gender on employment and on the impact of age on employment. There are fewer empirical studies, however, which have identified the dual disadvantage of this type of cumulative inequality. We suggest that studies of both a qualitative and a quantitative nature can be used to explore the outcomes of inequality from the combination of age and gender. The use of our model to further explore the cumulative impact on each career stage of gender and age may also generate additional information to further develop our understanding of this concept. Additionally, greater research on work engagement by age and gender could prove influential in contributing to an improved understanding of the attitudes and motivations of workers at different age and career stages. Finally, with regard to the issue of precarious employment, greater research is required on the impact of insecure working conditions on older women, for instance, how such arrangements may impinge upon state and private pension entitlements.

Conclusion

Women are penalised more often than men and at a younger age in relation to labour market opportunities. However, for an employee who believes that they were denied an opportunity, or dismissed based on a combination of age and gender, finding a satisfactory route to redress can be problematic. Best et al. (2011) found that under Equal Employment Opportunities legislation, plaintiffs that made intersectional claims were only half as likely to win their cases as plaintiffs who allege a single basis of discrimination. We argue that at organisational level, employers who want to address age or gender bias in their human resource practices should examine the aggregated impact of these characteristics on occupational segregation within their organisation.

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Part VI

Managing an Age-Diverse Workforce

24

Designing a HR System for Managing an Age-Diverse Workforce: Challenges and Opportunities

Edel Conway and Kathy Monks

Introduction

It is suggested that the ageing workforce represents one of the most defining social issues of the twenty-first century (Pitt-Catsouphes 2007). In this chapter, we consider the ramifications for organisations of this ageing workforce, in terms of the design and delivery of age-diverse human resource (HR) systems, by drawing on a wide range of international research literature and reports.

The chapter begins at a macro-level by examining demographic and labour market issues that are driving the need for organisations to develop age-diverse HR strategies. Second, attention is turned to the workplace to examine how age may be perceived in this context and how such perceptions may influence the types of HR systems that can be created. Third, we look at some of the options in designing age-diverse HR systems by examining generational and career-stage frameworks. These options span employee development, performance management, reward and recognition and flexible working practices. Finally, at a practice level, we consider the types of HR strategies, policies and practices that might be developed to build a suitable HR system for managing an age-diverse workforce.

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The Ageing Workforce: Macro-Level Trends

It is estimated that people aged 65 and older will make up 28.7 per cent of the EU population by 2080, which is a substantial increase from the 2014 figure of 18.5 per cent (Eurostat 2015). At the same time, the working age population (i.e. 15–64 years) is predicted to decline from its peak of 67 per cent in 2010 to 56.2 per cent in 2080. These trends present challenges and opportunities for both employees and employers; employees will need to accustom themselves to the notion that retirement does not necessarily have a fixed age-dependent date, while employers will need to revisit their HR policies and practices and assess how these might be tailored to encompass a more age-diverse workforce. Yet, it seems that employers have been quite slow in reacting to these trends (CIPD 2012), perhaps because they do not know how to do so effectively (Armstrong-Stassen and Ursel 2009). The situation is compounded by the fact that research on age diversity is not well developed, particularly when compared to research on race and gender (Shore et al. 2009). Research on ageing is also regarded as more descriptive than explanatory and presents quite mixed evidence (Lyons and Kuron 2014). Adding to this complexity is the lack of consensus about what defines an 'older' worker (McCarthy et al. 2014). The literature typically defines older workers as those aged 55 and older, who are approaching the conventional retirement age (Munnell et al. 2006). However, other studies consider older workers as those aged 40 or older (Ng and Feldman 2008), while others treat age as a continuous variable (e.g. Ng and Feldman 2010; Inceoglu et al. 2012). This lack of consensus presents difficulties not only for researchers but also for policy and decision-makers, including HR professionals, who need to proactively plan for and effectively manage an age-diverse workforce (McCarthy et al. 2014).

Perceptions of Age in the Workplace

A number of different perspectives on the ageing process exist in the workplace, and an understanding of these perspectives and their potential impact are vital to the design of an appropriate age-diverse HR system. This is because attitudes about ageing can influence decisions regarding selection, training and development, and performance management, which can lead to either positive or negative outcomes for employees and organisations.

Relational demography represents the degree to which individuals make comparisons between their own demographic characteristics and those of others within a social or work unit (Tsui et al. 1992; Riordan and Shore 1997).

Stereotypes or prototypes may be perpetuated where a majority of employees share similar demographic characteristics on what is viewed as important to effective functioning in organisations (Riordan and Shore 1997; Perry and Finkelstein 1999). Age stereotyping is primarily associated with negative beliefs about older workers, viewing them as less productive, more resistant to change, less open to training and development opportunities, less competent, more costly and more prone to illness (e.g. Rosen and Jerdee 1977; Finkelstein et al. 1995; Krings et al. 2011). In their seminal research, Rosen and Jerdee (1976, 1977) noted that perceptions about older workers' disinterest in technological change were linked to negative attitudes towards their development. Resistance among managers to offer training to older workers may be due to assumptions that they will have difficulty in grasping new concepts, and so will benefit less from training compared to younger workers (Duncan 2001; Wrenn and Maurer 2004).

Despite the prevalence of negative stereotypes at work, there is very little evidence to validate them (Posthuma and Campion 2009). In fact, evidence suggests that performance increases with age (e.g. Rosen and Jerdee 1988) and that job complexity can lead to increased cognitive functioning, particularly among older workers (Schooler et al. 1999). Studies also suggest that older workers have stronger interpersonal skills are more reliable, honest, sincere and committed, and are less likely to be absent or to leave their jobs (e.g. Broadridge 2001; Cuddy and Fiske 2002; Hedge et al. 2006). In addition, it has been found that older workers are more likely to engage in extra-role behaviours and are less likely to engage in counter-productive behaviours (Ng and Feldman 2008; Inceoglu et al. 2012). A survey of 3626 employees and HR professionals undertaken in the UK (CIPD 2014) found that employees identified many benefits of age diversity such as having different perspectives (72 per cent), knowledge sharing (66 per cent), new ideas (41 per cent) and improved problem solving (20 per cent).

There is also substantial research that captures employers' views on the employment of older workers. A study undertaken by Van Dalen et al. (2009) of employers in four European countries (UK, Spain, the Netherlands and Greece) found that across all countries, older workers (>50 years) were regarded as having better social skills, being more reliable and having higher organisational commitment compared to younger workers (< 35 years). However, older workers were also regarded as being less skilled in new technology, having lower physical capacity and being less willing to engage in training. The main economic consequences of seeing a future increase in the average age of workers were perceived as increased know-how and experience (UK and Spain), higher labour costs (the Netherlands) and higher absenteeism/ sick

leave (Greece). In addition, the CIPD (2014) survey of employees and HR professionals found that knowledge-sharing is regarded by HR professionals as the most common benefit associated with age-diverse teams (55 per cent), followed by enhanced customer service (14 per cent) and improved problem solving (9 per cent). The main concerns identified by HR professionals regarding the management of age diversity included age stereotyping, internal progression/succession planning and a lack of shared values between colleagues of different ages. In a Singaporean context (CIPD 2013), the benefits of employing mature workers were identified as: more experience (96 per cent), previous experience of working in a recession (87 per cent), higher loyalty and commitment (86 per cent), having a stronger work ethic (84 per cent), reduced turnover and associated costs (79 per cent) and reduced absenteeism (76 per cent).

Older Workers and Discrimination

Despite the evidence contradicting the stereotypes of older workers, there are indications that such stereotypes can lead to discrimination and unfair treatment (Shore et al. 2009). Research suggests that due to age stereotypes, older workers with the same or similar qualifications and characteristics as their younger counterparts receive lower ratings in interviews and performance evaluations (Avolio et al. 1990; Finkelstein et al. 1995; Rupp et al. 2005). There are also indications that older workers are disproportionately targeted during downsizing initiatives, given that they are typically perceived as representing a greater cost to organisations (Shore and Goldberg 2004).

Further evidence suggests that demographic similarity is an important component of the social context in which workers operate (Finkelstein et al. 1995; Riordan and Shore 1997). For example, Finkelstein et al. (1995) found that younger workers rated their younger counterparts higher than older workers in relation to their potential for development. In the case of performance management, Shore et al. (2003) found that younger managers consistently favoured younger workers over older workers. These negative outcomes are particularly evident when such workers are somewhat older than others in their work group (Cleveland and Shore 1992), including their manager (Shore et al. 2003). Rater perceptions can also be influenced by career norms regarding where an employee should be in their careers at a given age, which can lead to lower ratings among younger managers who perceive older subordinates to be 'behind schedule' (Lawrence 1988). These misalignments, which are often derived from societal norms of similarity and difference, have the potential to create conflict in the workplace (Shore et al. 2009).

Workplace Perspectives: Implications for the Design of an Age-Diverse HR System

As has been shown in our analysis of the evidence, there are mixed views—from both employers and employees—as to the role that older workers play within the workforce. At an organisational level, the attraction–selection–attrition paradigm (Schneider 1987) suggests that organisations may attract, select and retain either predominantly younger or older workers. The idea of ‘young typed’ versus ‘old typed’ jobs and the association of high-tech jobs as being ‘young-typed’ (Perry and Finkelstein 1999) have the potential to disadvantage older workers. For example, negative stereotypes may be activated when older workers apply for jobs that are deemed to be inappropriate for their age (Perry et al. 1996; Posthuma and Campion 2009). This issue is compounded by a preference for recruiting younger workers (Shore et al. 2009; Heywood et al. 2010), thus increasing the likelihood of young workers managing older workers, which may further perpetuate (often unfounded) stereotypes and lead to discrimination. Thus, while evaluators may have little doubt about the competencies of older individuals, they may nonetheless question their fit, given the mostly younger age profile that exists in an organisation (Shore and Goldberg 2004). This homogenisation of a workforce’s age profile has the potential to exacerbate age stereotyping (Posthuma and Campion 2009), but it will also prevent firms from maximising the full potential of the HR available.

Recent research suggests that training older employees will be critical in ensuring that they can contribute effectively to organisations and to the wider labour market (Herrbach et al. 2009; CIPD 2013). Yet, as previously noted, perceptions about the trainability of older workers, particularly in the area of technological change, are often negative. In addition, older employees nearing retirement may be reluctant to invest in their development and may regard training as less accessible due to employer perceptions about the limited payoff from such investment (Inceoglu et al. 2012). This notion is closely linked to occupational future time perspective, which relates to individuals’ perceptions about their future employment opportunities and constraints (e.g. Carstensen et al. 1999), and suggests that older employees perceive less time remaining and fewer opportunities than younger employees (Zacher and Freese 2009).

The digital age will continue to give rise to technological changes, thus relational demography will potentially influence HR decisions with younger workers increasingly likely to be recruiting, managing and evaluating older workers. These developments present quite significant challenges for HR professionals and organisations, particularly as evidence is growing to suggest that older workers are more willing to take legal action where discrimination

is perceived to have occurred (Posthuma and Campion 2009). Furthermore, with growing emphasis on continuous learning and employability, litigation on the grounds of age discrimination will be likely if older workers perceive they have been denied such opportunities.

Creating an HR System for an Age-Diverse Workforce

Given the issues described in the previous section, it is apparent that organisations need to design HR systems that take account of and plan for a workforce that encompasses workers of all ages. First, age will affect all individuals across their life and work span, and so all employees have the potential to be discriminated against (Martens et al. 2005). Second, as the workforce continues to age, organisations need to understand how individuals' needs may change in order to effectively manage age diversity. At the same time, designing an HR system is complex due to what is termed the 'age-period-cohort' confound (Lyons and Kuron 2014). This represents the interrelationships between: (i) age effects which occur as people mature, regardless of when they are born, (ii) period effects which occur due to influences at a point in time and (iii) cohort or generational effects which occur due to shared experiences (Parry and Urwin 2011). In order to link HR practices to the 'age-period-cohort' literature and to take account of these inter-relationships, we first focus on generational issues as a framework within which to design an age-diverse HR system.

Generational Perspectives

Generations can be viewed as those individuals of a similar age, who are in a similar location and who have experienced similar social, historical and life events (Mannheim 1952), or more commonly from a 'cohort perspective', which simply investigates people born in a given time period (Lyons and Kuron 2014). A key concern about research on generations is that 'systematic evaluations of the theoretical underpinnings and empirical evidence for generational differences are rare' (Parry and Urwin 2011: 80). As research in the area tends to be cross-sectional, it is difficult to separate generational from age effects, thus giving rise to the 'age-period-cohort' confound described earlier.

The literature identifies four generational cohorts in the workplace though differences in the time periods associated with each make comparisons

between studies difficult (Lyons et al. 2007). *Generation Y* (c. 1979–), often labelled Millenials, grew up in the ‘high-tech’ era and are regarded as the most racially and ethnically diverse cohort, who value meaningful work, life-long learning and view family as central to their happiness (Mitchell 1998). *Generation X* (c. 1964–1978) grew up in an age of economic uncertainty, recession and high unemployment (Lyons et al. 2007). Common stereotypes suggest that this generation is more likely to leave jobs to seek more challenge or better work-life balance (Cennamo and Gardner 2008; Smola and Sutton 2002). *Baby boomers* (c. 1948–1963) grew up in the age of civil rights and the sexual revolution, and are stereotypically characterised as achievement-oriented, competitive and independent (Cennamo and Gardner 2008). It is also suggested that they respect authority and are loyal and diligent (Yu and Miller 2005; Benson and Brown 2011). *Veterans* (c. 1939–1947), who grew up during the Great Depression and World War II, tend to conform to social norms, place high value on loyalty and regard work as a duty or obligation (Lancaster and Stillman 2002).

Research carried out by the CIPD (2008) among 5500 employees across six Western EU countries identifies some characteristics associated with each generation, as well as some ‘value propositions’ which should inform the types of HR practices that each will benefit from or seek. Table 24.1 summarises the findings.

Perhaps the most interesting finding from this study is the relative coherence in the types of HR practices identified, particularly for Generations X and Y. For example, work-life balance, a sense of work community and challenging work were identified across both generations. In addition, with the exception of expectations around pay, there was less variation in preferences among these two younger generations and Boomers. The report identifies the major sources of potential conflict between generations, including (i) the high level of loyalty among Veterans compared to others; (ii) the view among Boomers that pay should be linked to service rather than merit; (iii) the willingness for Generations X and Y to work longer hours for additional reward, and for Veterans to work beyond retirement age, which may be less appealing to Boomers; and (iv) Generation Y’s propensity to place higher trust in senior management compared to others. The finding that Veterans are more willing to work beyond retirement perhaps reflects the fact that retirement for them is in the foreseeable future but this is also a positive finding.

Further evidence suggests that Boomers show higher self-enhancement values (e.g. achievement and power) compared to Veterans and Generation X (Egri and Ralston 2004), and higher self-reliance, hard work and work centrality compared to Generations X and Y (Meriac et al. 2010). Time-lagged

Table 24.1 Employee values and HR practices across generations

Generation	Dates	Values propositions	HR policies and practices
Generation Y	1979–1991	Empowerment, challenging work Work–life balance Work community/social life Employability	Pay based on merit Lifestyle benefits Personal development: Growth opportunities Cross-organisational knowledge Leadership skills, customer service skills (service sector), Project management skills (Telecoms, Media and Technology (TMT) sector)
Generation X	1964–1978	Authority to make decisions Challenging work Work–life balance Work community/social life Outcome (rather than process) focused Recognition/success Lower loyalty	Flexible working Pay based on merit Team working Personal development: On-the-job growth opportunities Cross-organisational knowledge Leadership skills, customer service skills (service sector), project management (TMT), career management support (public sector)
Baby Boomers	1948–1963	Achievement-oriented, competitive, individualistic, independent Authority to make decisions Work–life balance Recognition Higher loyalty	Flexible working Pay based on service Personal development: Cross-organisational knowledge (TMT sector) Leadership (public and service sectors), customer service (service and professional sectors)
Veterans	1939–1947	Authority to make decisions Feel valued, to have experience recognised and to have opinions heard Serve others Higher discretionary effort	Flexible contracts beyond retirement Pay based on merit Personal Development: Coaching and mentoring (public sector) Project management Higher loyalty

Adapted from CIPD (2008) and Lancaster and Stillman (2002)

studies (e.g. Smola and Sutton 2002; Meriac et al. 2010) suggest that Generation X are much less loyal, more ‘me’ oriented and focused on life rather than work compared to Boomers. Overall, Generation X, and particularly Generation Y, appear to have lower work centrality, value leisure more, and seek more work–life balance when compared to Boomers (Smola and Sutton 2002; Cennamo and Gardner 2008; Twenge et al. 2010). Regarding individual differences, Generations X and Y are found to be more individualistic than older generations, and Generation X is more self-reliant, competitive and prefer independent work (Twenge 2010). Other time-lagged evidence suggests that intrinsic motivation is important across all generations, though slightly less so for Generation Y compared to Boomers, with little difference between Boomers and Generation X (Arnett 2004). There is also evidence of an increase in extrinsic values among younger generations compared to Boomers (Twenge 2010).

Benson and Brown (2011) compared Boomers and Generation X based on a sample of 6957 workers across a range of occupations in Australia. Overall, they found that Boomers were more satisfied and less likely to leave compared to Generation X. In the case of job satisfaction, job security and co-worker support were important to Boomers, while promotion opportunities, role clarity and supervisor support were important to Generation X. Regarding commitment, adequate resources and clear roles were important to Boomers, while co-worker support was important to Generation X. Finally, intention to leave was linked to low supervisor support (Boomers) and low co-worker support (Generation X). Importantly, three areas of HR practice—linked to job motivation, promotion opportunities and supervisor support—were important across both generations.

As Table 24.1 indicates, viewing a workforce from a generational perspective suggests that each generation holds different values and that a HR system will need to be designed to take account of these differing values. At the same time, there are also similarities in the types of HR practices that are proposed as part of this system. For example, flexible working and personal development opportunities, albeit tailored to specific generational needs, both feature strongly. The notion of merit-based pay emerges as important for three of the four generations. These similarities suggest that HR practices may need to be targeted in different ways for different generations but that taking a generational perspective alone in the design of an HR system for an organisation may not be optimum. We next consider the notion of career stage as a way of designing an HR system to take account of the ‘age-period-cohort’ dilemma.

Career-Stage Models

The literature suggests that individuals' goals and priorities change as they age (Baltes et al. 1999; Carstensen et al. 1999), and thus work-related motivation will differ between younger and older workers (Ng and Feldman 2010; Inceoglu et al. 2012; Kooij et al. 2011, 2013). A number of well-established career-stage models (e.g. Super 1957; Hall 1976) describe the importance that individuals attach to various work experiences, and Table 24.2 links these career stages to HR policies and practices that may be used to support the work values inherent in these stages.

As Table 24.2 indicates, the career-stage models highlight learning and exploration as important during the earliest career stage, suggesting that HR practices should focus on training and development opportunities for younger workers. During the mid-career stage, priorities are believed to shift towards a focus on stability and growth, thus suggesting that career development and job security will be important HR practices. Finally, in later career stages, it is suggested that job interest and job involvement will be key priorities.

Empirical research on ageing provides reasonable support for these career-stage models. For example, evidence suggests that career aspirations are highest during the earliest career stage (Carlson and Rotondo 2001) and that the importance of certain rewards (e.g. promotion and pay) decreases with age (Meyer 2001). In addition, flexible working arrangements such as reduced working hours are regarded as a high priority for older workers (Hedge et al. 2006; Eurofound 2014).

Other research considers age as a moderator between HR practices and outcomes. For example, in a study of 3019 scientists and engineers across six technology-intensive industries in the USA, Finegold et al. (2002) found that satisfaction with job security was linked to higher commitment and lower

Table 24.2 Career stages, work values and HR policies and practices

Career stage	Work values	HR policies and practices
Early stage	Emphasis on learning and development; Status, financial rewards and recognition; high-career aspirations	Focus on training and development; financial rewards; promotion
Mid-career stage	Emphasis on stability and growth	Career development and job security
Late career	Job interest and job involvement; autonomy	Interesting work; opportunities to use knowledge and skills; flexible working

Sources: Super (1957), Hall (1976), Finegold et al. (2002) and Kooij et al. (2011, 2013)

turnover intentions among older age groups (i.e. >31 years or older), whereas satisfaction with development opportunities was more strongly related to turnover intentions among younger employees. More recently, Armstrong-Stassen and Ursel (2009) found that older workers' perceptions of training and flexible working opportunities were linked to their turnover intentions. Conway (2004) also found that perceptions of employability were linked to affective commitment among older workers (i.e. 41 years or over).

Within a public sector context, Kooij et al. (2013) examined links between two bundles of HR practices (development and maintenance), worker wellbeing (organisational commitment, job satisfaction, perceptions of fairness) and self-rated performance. The development bundle included practices relating to formal training and development. The maintenance practices were concerned with protection and maintaining current levels of functioning (e.g. performance appraisals and career guidance). A third bundle, job enrichment, emerged from the analysis and included practices linked to challenging work and opportunities to make full use of training. The study found that the relationship between maintenance HR practices, wellbeing and performance was stronger with age, but that the relationship between development HR practices and wellbeing weakened with age. Further, development practices were negatively related to performance among younger workers and unrelated to older workers' performance. The link between job enrichment and performance was stronger with age, but there was no such relationship in the case of wellbeing. This study is valuable because it highlights the importance of maintenance and enrichment practices for ageing workers' performance.

While taking the career-stage or lifespan approaches to the design of an HR system for an age-diverse workforce provides some further clues as to the types of HR practices that might work better for individuals at specific career stages, it focuses in only a limited way on the older worker. The next section therefore examines in more detail the aspects of ageing that need to be considered in the overall design of the HR system.

Work Motives and Ageing

Decisions by older workers to extend their working life will depend on their attitudes about whether it can provide fulfilment, either through engaging work, social contact, status or money (CIPD 2012). A recent CIPD (2014) report on managing an age-diverse workforce suggests that the highest proportion of employees (38 per cent) expect to retire between the ages of 66 and 70, while almost one-third (31 per cent) expect to retire between the ages of 61 and 65, and only 11 per cent expect to retire between the ages of 56 and 60.

While the study finds that more workers expect to extend their working lives, there are mixed views as regards to the benefits of this decision, which were identified as economic independence (45 per cent), stimulation (36 per cent) and social interaction (34 per cent). What is perhaps somewhat more problematic, however, is that almost a third of employees (30 per cent) did not see any benefits to extending their working lives. These findings provide important clues about the motivations of older workers and what they might need or value at work and what type of HR system might encourage them to continue to contribute positively to the organisation.

In a study comprising two samples of 9388 and 2512 individuals, Inceoglu et al. (2012) found that job features yielding high personal resources (e.g. competition and power) and those yielding extrinsic rewards (e.g. career progression and material rewards) were regarded as less motivating among older individuals, who instead valued intrinsic motivators (e.g. autonomy and personal principles). The findings suggest that older workers are not less motivated, but rather are motivated by different job features compared to younger workers. Kooij et al.'s (2011) meta-analysis found that age was positively related to intrinsic motives (e.g. interesting tasks, working with others and autonomy) and negatively linked to growth motives (e.g. advancement and learning) and extrinsic motives (e.g. status, financial rewards, and recognition). They suggest growth motives may be less important due to a decline in fluid intelligence and learning ability due to ageing (Ackerman 1996). This may explain the importance of intrinsic motives among older workers, which rely less on these abilities. In addition, social motives linked to helping others and contributing to society were positively linked to age.

While the management of older workers will require the same attention to the range of HR practices that are used in the management of the workforce in general, specific consideration should be given to the particular needs that older workers may have (Flynn and McNair 2011). Expanding on the lifespan approach (Baltes et al. 1999), Kooij et al. (2014) found evidence of four bundles of practices for ageing workers: (i) development, (ii) maintenance, (iii) utilisation and (iv) accommodative. This signals that older workers are not homogenous and that a more idiosyncratic approach to the management of the ageing worker is needed.

Table 24.3 identifies different types of older workers and, while broad classifications can be problematic, these types highlight the fact that older workers, similar to younger workers, differ in the particular needs and expectations that they have of work and careers. The table identifies, based on evidence of Kooij et al. (2014), the types of HR bundles that fit with each type of worker.

In conclusion, the analysis of generational and age-related research suggests that each is useful in informing the overall design of the HR system for an

Table 24.3 Types of older workers

Type	Motives	HR bundles
Aspirers	Individuals who actively seek new challenges through promotion or changed roles	<i>Development:</i> Career planning; development on the job; promotion; regular training
Stayers	Individuals who are happy in their current work and are keen to carry on working but are not sure for how long	
Downsizers	Individuals who would like to work longer but at reduced hours. They would like flexible working and flexible retirement	<i>Maintenance:</i> Compressed working week; ergonomic adjustment; flexible benefits; flexible working times; performance appraisal; performance pay; working from home
At risk	Individuals who have been in the same organisation or job for a long time and whose skill set may be limited. They may welcome training to enhance their skills and employability	<i>Utilisation:</i> Lateral job movement; coaching; participation; task enrichment; second career
Leavers	Individuals who wish to retire sooner rather than later	<i>Accommodative:</i> Additional leave; demotion; early retirement; exemption from working overtime; prolonged career interruption; reduced workload; working part-time/ semi-retirement

Source: Adapted from CIPD (2012) and Kooij et al. (2014)

age-diverse work force. In broad-brush terms, job enrichment, skill development/employability, autonomy and flexible working are important priorities for older workers, while training and development, status, financial rewards and other forms of recognition are important for younger workers. However, given that individuals' motivation to work will not simply vary by age, such elements can only inform the overall design of an HR system rather than setting it in stone. The next section examines the types of HR strategies that might be considered to enable organisations to manage an age-diverse workforce effectively.

HR Strategies for an Age-Diverse Workforce: Practice Implications

The final section of this chapter considers the practice implications of the research on ageing. We begin by considering the components of an HR system for an age-diverse workforce. We then examine the way in which

organisations might gather and review evidence regarding their HR strategies in regard to the workforce before examining the specific areas in which HR policies and practices might be developed to manage an age-diverse workforce effectively.

Designing an HR System for an Age-Diverse Workforce

The design of an HR system for an age-diverse workforce will need to include all the basic elements of any HR system, that is, a set of HR policies, practices and processes (Schuler 1992; Monks and McMackin 2001; Monks et al. 2013) that can be linked to outcomes at employee and organisational levels. In addition, the inclusion of a particular HR philosophy as ‘a statement of how the organisation regards its HR, what role the resources play in the overall success of the business and how they are to be treated and managed’ (Schuler 1992: 21) would seem to be particularly important given the complexity of catering for the differing needs of an age-diverse workforce.

There are various guides to good practice in managing an ageing workforce (e.g. Naegele and Walker 2006; CIPD 2008, 2012; Eurofound 2012, 2014; Department for Work and Pensions 2013). Table 24.4 synthesises their recommendations to provide a starting point for the creation of an age-diverse HR system.

Developing HR Practices

The measures listed above can provide organisations with an understanding of their existing policies and practices and how these might be leveraged or altered to take account of age diversity. The next section looks more specifically at particular types of HR practices and how these might be designed to appeal to and manage successfully an age-diverse workforce.

Attraction and Selection

As well as attracting the next generation of workers, organisations need to remain focused on their core values and competency needs and identify who—regardless of age—will meet their requirements. Steps taken will need to be reflected in the organisation’s employer brand and how this might be appealing across the generational ‘divide’.

Table 24.4 Designing an age-diverse HR System: reviewing the existing HR system

Evidence	Outcome
Analyse the age profile of the workforce and the impact of changes in the future generational mix taking into account local and national demographics	Provide an overview of the composition of the workforce, enabling workforce planning to be undertaken and identifying staffing and succession planning issues and skills shortages
Review and monitor decisions relating to recruitment, selection, training, performance management, promotion and reward on the basis of age	Promote awareness of legal obligations regarding age discrimination and offer training to decision-makers on fallacies around age-related stereotypes; identify issues regarding discrimination and remove age barriers; develop a comprehensive policy with regarded respect and dignity
Survey employees to determine their needs at work and monitor levels of engagement and wellbeing	Determine the extent to which work experiences meet the needs and motives of employees; identify potential causes of problems related to retention and absenteeism
Assess internal communications systems	Ensure communication mechanisms are sufficiently flexible to deal with diverse employee needs; enhance awareness of the broad diversity agenda and of the HR practices that support it
Analyse career development opportunities	Prevent poor or underperformance among staff who are denied access to development opportunities
Assess team profiles	Ensure diversity in team composition to provide a balance between skills, experience and innovation
Review flexible working options	Avoid the early departure of staff who would like more flexibility in their working schedules
Provide opportunities for employees to act as coaches and mentors and to be coached and mentored	Capture the wisdom of employees with significant knowledge and experience; improve understanding between generations; enhance developmental opportunities

Sources: Naegele and Walker (2006), CIPD (2008, 2012), Eurofound (2012, 2014) and Department for Work and Pensions (2013)

Employee Development

Training and development initiatives will need to balance carefully the career self-management of younger workers, with the need for more structured career support for older workers. Older workers will need to be given ongoing access to training if they are to remain motivated and committed. Beyond the provision of new skills, organisations will need to address the potential vulnerability of older workers who may lack confidence, fear exposure, or who may have had quite negative early experiences with education and training (Beck 2014). In addition, employers will need to avoid juxtaposing older versus younger workers and qualities such as soft (e.g. commitment, reliability) versus hard

(e.g. adaptability, qualifications) and instead adopt a more balanced approach to employee development in order to enhance and sustain the participation, productivity and employability of all employees.

Reward and Recognition

Organisations will need to carefully manage expectations in terms of how rewards are determined (service vs. merit) and manage conflicts that may arise as a result. Reward practices that incorporate some element of recognition of service and experience will communicate that these attributes are valued. Performance management systems will be important not only in determining the basis of rewards but also in giving feedback which will enhance intrinsic motivation, self-esteem, confidence and feelings of being valued by the organisation.

Flexible Working

The evidence presented throughout this chapter suggests that interventions to enhance the work–life balance and leisure time of younger workers/generations will be needed. However, it also suggests that this level of flexibility may also be appropriate for older employees as they enter phased retirement. Such measures, which may include compressed working weeks or flexi-time around starting and finishing times, would clearly address these needs. In addition, onsite crèche, laundry, gym and medical facilities would help larger firms in particular meet the lifestyle needs of its employees. Research by the CIPD (2014) suggests that some organisations are employing a range of initiatives such as flexible working options (42 per cent) and a flexible retirement policy (30 per cent), and the initiatives deemed to be particularly effective are part-time working and flexible work arrangements. There is also evidence that individuals aged 65 years or older, and who are still in employment, would prefer a working week of 29 hours (Eurofound 2014).

Employee Attitudes About Work

To better manage important employee-related outcomes—broadly defined here as job satisfaction, commitment and retention—organisations will need to offer work–life balance and flexible options that will appeal to employees across different ages or generations. Research suggests that work motivation is critical and therefore features of job design that provide organisation-wide development opportunities, work–life balance and teamwork will be

important regardless of age or generation. Retention policies will need to take account of life stage: commitment and particularly continuance commitment can be higher among older workers who regard themselves as less employable in the marketplace (Conway 2004).

Conclusion

This chapter set out to identify some of the issues underpinning the design of an age-diverse HR system. There are a number of key learning points from the literature reviewed in the chapter. The first is that while stereotypes have the potential to lead to discrimination in the workplace, with various negative implications for individuals and organisations, such stereotypes are largely unfounded. The second is that older workers are not less motivated or committed than younger workers but rather that they are motivated by different work features (Inceoglu et al. 2012). Finally, there are a range of options for organisations to consider towards building an age-diverse workforce, and these need not involve extensive tailoring of HR practices, but rather should take account of and build on a particular HR philosophy that values the contribution of all employees, regardless of age.

Research linking age and HR systems is still in its infancy and therefore presents valuable research opportunities. Opportunities here can be divided into those that will enhance understanding of employees, as such understanding will lead to a better fit between employee needs and HR system design, and those that explore employee reactions to existing HR systems. With regard to research required to enhance understanding of employees, there is a need to discover more about the broader cultural, societal and economic perspectives on ageing (Shore et al. 2009; Parry and Urwin 2011). Such an integrative approach would help to develop a richer understanding of how stereotypes are influenced by both work and non-work factors and about how different international contexts embrace and develop age-relevant policies and legislation that influence and embed age diversity in workplace settings. More research is needed to establish whether the newest generation, Generation Y, will transpire to be ‘the most high maintenance workforce in the history of the world’ (Tulgan 2009: 1). With regard to understanding more about employee reactions to existing HR systems, research might focus on disentangling the true effects of age and generational differences. Also, rather than relying on cross-sectional studies to understand the effects of age or generation on outcomes, these effects should ideally be based on longitudinal and time-lagged designs (Twenge 2010). At the same time, we concur with Lyons and Kuron

(2014) that, particularly given the quite sparse and conflicting evidence, longitudinal or time-lagged and cross-sectional data be regarded as complementary rather than competing forms of evidence. As these authors point out, cross-sectional data can be desirable for practitioners who need guidance on how to effectively manage an ageing workforce. Finally, we suggest that the ways in which particular HR philosophies may impact on how age is viewed within organisations also provides promising research opportunities. We suggest that it is perhaps an organisation's overall perspective on diversity and the ways in which it is perceived and valued (or otherwise) that may determine the successful management of an age-diverse workforce.

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25

Considering Age Diversity in Recruitment and Selection: An Expanded Work Lifespan View of Age Management

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Understanding and promoting age diversity in the workplace are both particularly important considerations for the design and implementation of organisation entry processes, such as recruitment and personnel selection (e.g., Loretto and White 2006; Brooke 2003). For the most part, recruitment and selection represent the primary means of gaining entry into an organisation, and both processes serve multiple roles in structuring applicant and new-hire experiences (e.g., Smither et al. 1993). For example, recruitment and selection serve important socialisation functions to the extent that participation in these processes convey norms, expectations, values, and company culture and climate to job applicants (Cooper-Thomas and Anderson 2006; Rousseau 1990). As core personnel and human resources management (HRM) practices, recruitment and selection can be characterised and defined in numerous ways (e.g., from strategic or organisation perspectives). One way of understanding recruitment and selection that is particularly germane to a discussion of promoting age diversity is to consider various judgement and decision points that characterise each process.

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Among other things, recruitment decisions involve choices around recruiting sources, including whether to recruit from internal or external labour markets. More generally, recruiting involves decisions around the presence and image that companies project to potential applicants (Rynes and Barber 1990; Rynes et al. 1991). For example, expectations regarding the organisation and the job can be influenced by the way in which information is conveyed to applicants in the form of realistic job previews (RJP; Phillips 1998). Collectively, recruitment decisions have the potential to affect the age diversity of an applicant pool. For example, if recruiting is done narrowly, age diversity may be undermined to the extent that recruiting messages fail to target older or more experienced job applicants. On the other hand, if recruitment places undue emphasis on accrued work experience, younger—yet qualified—applicants may be turned away. Furthermore, aspects of the recruiting and selection process have the possibility of affecting self-selection (e.g., voluntary withdrawal from the recruiting, vetting, or selection process; Bretz and Judge 1998). To this end, understanding the factors that contribute to the attraction to, selection into, and attrition from an organisation (ASA; Schneider 1987) is potentially valuable for understanding the totality of this process.

Decisions surrounding personnel selection are a bit more conceptually abstract. Ultimately, hiring decisions (i.e., hire/don't hire) are the goal of any selection process, and such decisions are potentially subject to the complex influence of age bias (e.g., Perry and Finkelstein 1999). However, several intermediate decisions tend to cumulate and affect this ultimate outcome. Most obviously, relatively subjective judgements of an applicant's perceived person–job or person–organisation fit (P–O fit; Kristof-Brown et al. 2005) and in particular age–job fit (Cleveland and Landy 1987; Perry et al. 2012) may occur. For example, research by Rynes and Gerhart (1990) suggests that subjective P–O fit judgements are more related to job applicants' personal characteristics (e.g., interpersonal skills, physical attractiveness) than objective job qualifications, such as work experience. Additionally, decisions that are made in the design and implementation of selection systems can also serve as potential age barriers (e.g., the design of interviews, the value, or weight placed on job experience, etc.).

Goals of the Present Chapter

Presently, we make the argument that various decisions that characterise recruitment and selection can serve to mitigate or exacerbate age-related processes that might lead to ageism, which may ultimately limit the age diversity of an applicant pool. To accomplish this, we have attempted to provide an expanded view

of age management (Naegele and Walker 2010; Walker 1999) that considers personnel selection along with recruitment as HRM processes that are constructed from a series of underlying decisions that can be actively age-managed.

Age management is typically characterised by a set of strategic “best practice” decisions that actively attempt to integrate ageing-focused policies in the design and implementation of workplace policy (Naegele and Walker 2003, 2010; Walker 1999). Herein, we specifically address two points of departure from the extant literature on age management. First, most research and scholarship on age management have focused on developing best-practice recommendations for increasing age diversity by focusing on policies focused exclusively on older workers. Here, we take broader work–lifespan view on age management and suggest that such policies and procedures are important at all stages of one’s career—from the initial entry into the workforce to exit in the form of final retirement.

To this end, we suggest that efforts to increase age diversity must focus on the broad spectrum of age and not solely focus on increased participation and inclusion for “older workers.” Second, while the age management literature has outlined best practices for the design and implementation of recruitment systems (among others, see Böhm et al. 2013; Fyock 2005), selection systems and processes have been largely ignored in this literature. To this point, we address the as-of-yet overlooked role of the design and implementation of selections systems to maximise positive age management. In doing so, we will attempt to build the case that a powerful means of promoting good age management practices is through designing systems that both properly value the role of experience and reduce the deleterious impact of ageing stereotypes. Finally, we provide recommendations for the use of an active intervention strategy (i.e., the structured free recall intervention; SFRI) that may be integrated into age management practices that involve personnel judgements and decisions. The goal of introducing such an intervention is to ensure that age-based stereotypes do not unduly affect this process. Before addressing these particular issues, however, it makes sense to first turn our attention to a discussion of ageism and age stereotypes in work contexts in general, the nature of age bias in job recruitment and selection specifically, and the proposed theoretical mechanisms that explain why and how age bias affects such processes.

Ageism and Age Stereotypes in Work Contexts

Most generally, ageism refers to prejudice and discrimination directed towards an individual on the basis of their age. A recent study from AARP suggests that 64 per cent of individuals surveyed reported that they have experienced or

witnessed age discrimination at work (AARP 2012). In the United States, the Age Discrimination in Employment Act of 1967 strictly prohibits discrimination against applicants and employees 40 years of age and older on the basis of age, in terms of hiring, promotion, compensation, and other functions of employment under federal law. In 2014, over 20,000 charges were filed on the bases of age discrimination in the United States, which amounted to 23 per cent of the total discrimination charges filed (United States Equal Employment Opportunity Commission 2014). Of the 20,000 charges, \$77 million was paid in settlements (United States Equal Employment Opportunity Commission 2014). The European Union has had a similar directive that established a general framework for equal treatment in employment settings since 2000. The United Kingdom also enacted the Equality Act in 2010, which protects all workers from age discrimination in the workplace and abolished the use of age limits in recruitment and selection (AgeUK 2015). Despite the enactment of this law, cases brought on the basis of age discrimination rose 31 per cent from 2010 to 2011 (AgeDiscrimination.info 2011). As such, it is arguably necessary for organisations to consider new aging perspectives on organisation entry to ensure the fair and equal treatment of applicants of all ages.

While traditional views of ageism have focused on mistreatment of older individuals (e.g., Butler 1969), more contemporary views position ageism as mistreatment on the basis of age, for an individual of any age. Therefore, ageism can manifest for individuals, regardless of their age. Amassed evidence suggests that ageism occurs in a variety of work contexts, and various lines of evidence for the presence and occurrence of ageism at work can be drawn from laboratory and field research, and from the outcomes of litigation concerning age-based discrimination. Cumulatively, this evidence suggests that workplace ageism typically occurs when individuals are systematically overlooked for opportunities on the basis of their age. However, the effects of ageist attitudes and behaviours may exist more covertly and cumulate in far more complex ways. For example, recent scholarship points to the roles of shared attitudes regarding ageing to the development of organisation cultures and climates that support ageing (Zacher and Gielnik 2014; Kunze et al. 2011). To the extent that positive attitudes regarding ageing prevail within organisations, culture and climate dimensions that support positive ageing should follow. This idea further underscores the importance of understanding the valence and scope of attitudes towards ageing within work contexts.

Social-cognitive perspectives suggest that stereotypes are a noted driver of discriminatory behaviour in evaluative scenarios that involve judgements. Stereotypes are overgeneralised expectations and beliefs about the characteristics and behaviours of outgroup members (Fiske 1998). More specifically, ageing stereotypes represent cognitive schema that associate characteristics

and behaviours with various age groups. To the extent that such stereotypes are endorsed, information processing (e.g., observation, interpretation, storage, and retrieval) can be biased towards these stereotypes (e.g., Dobbins et al. 1988; Feldman 1981; DeNisi and Williams 1988). Considering age, if prototypical characterisations of age groups differ, then differential evaluations and judgements are likely. Indeed, research has linked the endorsement of overt ageing stereotypes to discriminatory attitudes and behaviours in the workplace (Avolio and Barret 1987; Rupp et al. 2006).

With respect to workplace ageing stereotypes and ageism, most research has focused on the content and implications of other-referenced (i.e., focusing on perceptions of others) age stereotypes that characterise older workers (e.g., Hassel and Perrewe 1995; see Posthuma and Campion 2008, for a review). There is, however, no shortage of evidence for the presence of stereotypes against *younger* workers (e.g., Gilbert 2011; Graves 2012; Smith 2013). With some notable exceptions (e.g., Bertolino et al. 2013; Truxillo et al. 2012c), research has yet to adequately address stereotypical characterisations of other age groups besides older workers (e.g., younger workers or middle-aged workers). Workplace ageing stereotypes tend to pit the capabilities and characteristics of older workers against those of younger workers. However, it is important to note that evidence suggests that younger worker stereotypes are not simply the opposite of older-worker stereotypes (e.g., Myers and Sadaghiani 2010; Perry et al. 2013; Strauss and Howe 2000; Zacher and Gielnik 2014).

Furthermore, older-worker stereotypes often reflect both negative and positive generalisations. For example, older workers are often characterised as more reliable than younger workers, which is a positive assumption (see Bal et al. 2011). Despite this, evidence suggests that employers value the positive characterisations of older workers (e.g., high levels of experience, better judgement, commitment to quality, low turnover, attendance, and punctuality) less than other traits (e.g., flexibility, acceptance and knowledge of new technology, ability to learn new skills, and physical abilities to perform in strenuous environments) that are often used to negatively characterise older workers (AARP 1995).

Regarding the content and validity of older-worker stereotypes, Posthuma and Campion (2008) qualitatively review various lines of evidence that contradict many of the most common older-worker stereotypes (e.g., older workers are poor performers, resistant to change, possess a lower ability to learn, have a shorter tenure, are more costly). Moreover, Ng and Feldman (2012) meta-analysed evidence for six of the most commonly cited older-worker stereotypes (i.e., older workers are less motivated, less willing to participate in training and career development, more resistant to/less willing to change, less trusting, less healthy, and more vulnerable to work–family imbalance). While evidence supported the stereotype-consistent idea that older workers

are generally less motivated to participate in training and career development, the magnitude of this effect was small, and there was no relationship between age and actual participation in training.

Why Ageing Stereotypes Affect Work Processes

We often assume that age-related stereotypes are a mechanism underlying ageism. Social-cognitive perspectives view stereotypes as a form of cognitive schema, and suggest that overgeneralisations and mischaracterisations lead to incorrect judgements that potentially drive prejudice and discrimination based upon age. Recent scholarship by North and Fiske (2012, 2013) suggests a more relational perspective on stereotype effects by making a distinction between *descriptive* and *prescriptive* age stereotypes. Descriptive age stereotypes involve expectations about what older people typically “do,” whereas prescriptive age stereotypes entail what older people “should do,” particularly with respect to resource use (e.g., sharing, divestment thereof; North and Fiske 2012, 2013). North and Fiske (2012, 2013) outline three prescriptive and age-graded stereotype dimensions: (1) active *succession* of enviable positions and influence, (2) minimising passive shared-resource *consumption*, and (3) age-appropriate, symbolic *identity* maintenance.

Prescriptive stereotypes define normative expectations for the behaviour of others, and inattention to or violation of these expectations can drive negative age perceptions. Considering a work-relevant example, postponing retirement (e.g., working longer) might be perceived as violations of succession (e.g., “holding on” to a desirable position), consumption (i.e., taking more than one’s “fair share” or company resources), and/or identity-based prescriptive norms (i.e., violating organisation exit norms with respect to age). Likewise, because prescriptive stereotypes are age-graded in nature, quick advancements through the ranks of an organisation for a relatively younger employee could be likewise perceived this way (e.g., the perception that relatively younger workers are “skipping ahead” in line, not “putting in their time,” or not “acting their age,” cf. Lawrence 1984, 1988).

Age Bias in Recruitment and Selection

Empirical evidence suggests that biased judgements are more likely in situations where relatively little information is available to decision makers. One explanation for this is that decision-makers tend to default to cognitive schema when forming judgements under uncertainty. As such, individuating

information is a powerful mechanism for mitigating the impact of stereotypes. Unfortunately, organisation entry processes are particularly susceptible to the occurrence of biased decisions because levels of individuating information are relatively low. Moreover, many have posited that the existence of ageism in work contexts results from a widespread and vastly overstated belief that job performance declines with age (e.g., Finkelstein et al. 1995; Perry et al. 1996). Age has been studied in the context of personnel research for some time, and amassed evidence overwhelmingly suggests that age is a poor predictor of job performance (Schmidt and Hunter 1998, $\rho = -.01$). Notably, however, job experience has been linked positively to job performance ($\rho = .18$). Considering meta-analytic evidence further, Waldman and Avolio (1986) found that there was no appreciable relationship between age and objective work-performance criteria—however, older workers received lower performance ratings when more subjective supervisory performance assessments were considered.

Taken collectively, this body of research underscores the *bad news*, in that there is an accumulation of evidence suggesting that ageism can creep into personnel decisions (Finkelstein et al. 1995; Bal et al. 2011), including those that surround recruitment (e.g., McGoldrick and Arrowsmith 1993) and selection (e.g., Singer and Sewell 1989). The *good news*, however, is that given the ubiquity of organisation entry processes, there are myriad opportunities to structure organisation entry systems in a way that mitigate the impact of ageing stereotypes and promote age diversity (Böhm et al. 2013).

An Expanded View of Age Management

Age management generally refers to “the organisation HRM dimensions employed to manage human resources with an explicit focus on the demands of an ageing workforce” (Böhm et al. 2013: 216). One way to think about age management is in terms of age-conscious processes for accomplishing core HRM practices. For example, age management has typically been organised around sets of guidelines that specify best practices for actively managing age across a number of organisation processes (e.g., recruiting, training and lifelong learning, career management and redeployment, flexible work time and work arrangements, health management and workplace accommodations, performance measurement and remuneration, transitions to retirement, see Böhm et al. 2013: 226, Table 12.1).

To the extent that the design and implementation of organisation entry systems are grounded in the principles outlined by age management, one might expect a commensurate decrease in the prevalence of ageism and age

bias in the application of such processes. This line of reasoning can be viewed as an extension of recent scholarship that has incorporated the notion of diversity and equality management into the well-established literature on high-performance work systems (e.g., Armstrong et al. 2010). For example, research has suggested that relational coordination (e.g., shared goals and knowledge, and mutual respect) may result from high-performance work systems designed to be *relational* in focus (i.e., work practices that are focused on building employee–employee relationships by reaching across multiple functional roles to engage employees in coordinated effort—e.g., selection systems that are designed to address cross-functional work activities, see Gittell et al. 2010).

It is important to note that we are not recommending that an organisation matches job characteristics with age or life stage. This would suggest more of a top-down *age crafting* perspective, such that job characteristics are adapted to fit the developmental needs of workers on the basis of age to increase their satisfaction, productivity, and engagement (see Truxillo et al. 2012c). Instead, we focus here on the conscious consideration of age management principles as a bottom-up practice that informs the design of organisation entry systems. Age management suggests a proactive approach to considering the impact of an aging workforce on HR systems surrounding recruitment and selection. From this perspective, it is recommended that an organisation design such HR systems so as to mitigate discrimination on the basis of age, and we argue that well-designed entry systems can diminish the effects of age stereotypes and ageism to a great extent.

With respect to organisation entry processes, age-conscious recruitment is well represented by the age management literature. For example, Böhm et al. (2013) outline age-conscious recruiting in terms of systems that afford equal or special access to jobs for older employees/applicants. Several age-related HR practices can support this, including ensuring that job advertisements and job descriptions are age-neutral (i.e., empirical evidence suggests that subtle ageism may creep into the design of job advertisements, e.g., McGoldrick and Arrowsmith 1993). Age-conscious recruiting can include efforts to specifically target recruiting towards older workers, including the possibility of considering re-recruiting retired employees for bridge employment roles. Again, this is not to say that organisation should necessarily change the nature of the job or position to fit the needs of an aging workforce. However, if during the job analysis process, it comes to light that the position can be adequately and appropriately filled by various non-traditional workers (e.g., bridge employees), then targeting such individuals should benefit the recruitment and selection system. These ideas are explored further below.

Best practices surrounding age-conscious design and implementation of personnel selection systems are noticeably absent from the age-management literature. Perhaps this is because well-designed, comprehensive, and best-practice conforming selection systems are generally set up to minimise the possibility of discriminatory outcomes in general. However, we would suggest that some facets of selection system design and administration should be considered through the age-management lens. To begin, and in line with recent scholarship, we define age-managed selection in terms of equal access to jobs for older employees/employees of all ages, such that there is no direct age-based discrimination in hiring and placement decisions. Age-conscious selection has the advantage of leveraging previous job experience, which supports the diversity of knowledge, skills, and abilities (KSAs) and expertise (e.g., Homan et al. 2008). Consistent with the past literature, age-conscious selection can be considered in terms of a variety of examples of age-related HR “best practices” in the design and implementation of selection systems. With this idea in mind, we next consider facets of age-tailored recruitment and selection, in turn.

Age-Conscious Approaches to Recruiting

Organisations can mitigate age bias in the recruitment process by using an age-tailored and age-conscious approach to recruiting job applicants. Here, we focus primarily on organisation-level strategic recruiting decisions (i.e., the strategies and methods put in place by the organisation during the design and implementation of a recruitment effort) that may best incorporate age-management practices. For example, specifically targeting older workers from external labour markets is a recruitment strategy that allows organisation to pursue applicants with a wide range of accumulated experiences, who may be more willing to consider positions that involve non-traditional staffing options that are particularly attractive to older workers (e.g., part-time work or job sharing).

Older workers represent a subset of the current workforce possessing a wealth of potentially untapped resources, including work experience and accumulated job-relevant knowledge and skills (Posthuma and Campion 2008; Tillsley and Taylor 2001). As older workers retire from the workforce in increasing numbers, they retire with them this accumulated knowledge and experience, creating a potential “knowledge gap” that the emerging workforce may not be qualified to fill (see DeLong 2004). At a more macro-level, the employment of older workers helps to reduce financial strain on retirement

systems (Walker 2007). Indeed, when considering the design of recruitment systems, there are several similar organisation-level decisions that can influence the success of attracting older job applicants.

Recruiting Presence and Image

Many recruitment decisions involve “how” to attract potential candidates. This issue is complicated when the goal of recruitment is to attract a specific subset of the workforce. To this end, recruiting messages that emphasise that an organisation is an “ageing friendly workplace” can be a powerful recruitment strategy. Ageing friendly organisations support the successful development of individuals across the work lifespan (Böhm et al. 2013). A key strategy for cultivating this image in the recruiting process is the use of advertising materials. In developing such advertisements, organisations should consider the actual content of the advertisement (including, e.g., photographs to be used), and the placement and type of advertisement medium used (Doverspike et al. 2000). Indeed, the content of the recruiting advertisement can be used in subtle ways to project to older applicants that their contributions will be valued and supported. In addition to giving descriptions of the job role, recruitment advertisements can include phrases or statements that explain they are seeking experienced or skilled workers in job postings to emphasise the value of past work experience (Doverspike et al. 2000; Naegele and Walker 2010).

Recruitment advertisements can also highlight other employment benefits valued by older workers to reinforce the “ageing friendly workplace” image. From a signalling theory perspective, highlighting the aspects of employment that are most important to older workers represents a powerful signal (Doverspike et al. 2000; Naegele and Walker 2010). For example, retirement planning and defined benefit contribution policies may be particularly attractive to older workers (Smyer and Pitt-Catsouphes 2007). Older workers also perceive opportunities for mentoring, social relationships, and fulfilling work as attractive in the job search process (Fandray 2000; Fyock 2005; Smyer and Pitt-Catsouphes 2007). Doverspike et al. (2000) recommend incorporating photographs of older individuals into job postings and organisation advertisements to signal to applicants that the organisation supports and values the development of its incumbents across the lifespan. Lastly, the location and modality of recruitment advertisements can be strategically leveraged in order to target large sources of older applicants as well as bridge employees. For example, Doverspike et al. (2000) suggest targeting temporary agencies,

senior centres, volunteer groups, adult education centres, and neighbourhoods in which large populations of older adults reside.

It is important to note that age-conscious recruitment efforts could backfire if the organisation falsely portrays itself as ageing friendly. Avery (2003) emphasises the issue with increasing false applicant P–O fit perceptions in minority candidates during the recruitment process. From an applicant perspective, P–O fit refers to the fit between the organisational values and their own values (Kristof 1996; Kristof-Brown et al. 2002). If an organisation tries to induce the perception that they value successful ageing, and these expectations are not met upon entering the organisation, negative outcomes may result (e.g., turnover). Failing to meet asserted expectations can thus result in a mismatch between impressions of the P–O fit from pre-hire to post-hire (McKay and Avery 2005).

One way to address this potential mismatch is to conduct an age diversity audit (McKay and Avery 2005). In order to portray a genuine image, it is necessary to gather information about the current climate for ageing within an organisation. This can be done through the use of survey instruments designed to measure how an organisation and its constituents view and support individuals across the work lifespan (Böhm et al. 2013). Additionally, organisations can conduct interviews with their older incumbents to understand their work experiences (McKay and Avery 2005). These steps can help organisations understand their current age diversity efforts and help shape their recruitment strategy. As such, if an organisation finds that they have a less than favourable climate for ageing, they should not include messages in their recruitment material that would falsely inspire perceptions of “age friendliness” per se in candidates. McKay and Avery (2005) suggest that these companies should advertise the benefits of the job role or other attractive aspects of the company instead. On the other hand, if an organisation finds that it has a positive climate for ageing, it should use that to their advantage. Not only is such an organisation able to advertise its support for its employees across the lifespan, but it also will be able to follow through on those expectations when older employees join their organisation (McKay and Avery 2005). Future research would benefit from examining the effect of incorporating “age-friendly” workplace images and messages into recruitment and entry systems. Specifically, researchers could examine the extent to which these efforts help to increase the age diversity of applicant pools, and the perception that an organisation’s entry system is open to applicants of all ages. Additionally, future research would benefit from examining the extent to which age audits can be optimally applied to help shape age-conscious recruitment strategies.

Another way to provide a genuine impression of the job role and organisation is to present the candidates with a RJP during the recruitment process. RJPs provide the applicant with positive and negative information about the aspects of the job role and the organisation itself (Buckley et al. 2002). When well applied, RJPs can lead to decreases in turnover (Ilgen and Seely 1974; McEvoy and Cascio 1985). Moreover, RJPs may help to mitigate any inflated positive expectations provoked during the recruitment process by providing candidates with more accurate information about their potential future at an organisation (Phillips 1998; Buckley et al. 2002). As such, if an organisation's climate for ageing is less than desirable, other aspects of the job may be attractive to applicants that may compel them to pursue entry regardless (McKay and Avery 2005). Future research should examine the extent to which ageing-focused RJPs are effective for managing the expectation that an organisation supports an individual across the lifespan, and this broader literature would generally benefit from more research examining the use of RJPs from an age-management perspective.

Targeting Non-traditional Workers

Similarly, organisations can target non-traditional workers by establishing flexible staffing options for candidates. Again, this is not to say that jobs should be necessarily redesigned to meet these goals. However, if the results of job analysis uncover the potential for flexible staffing options (e.g., flextime, job sharing or a compressed workweek) that are attractive to older workers, then the organisation's recruitment and selection systems would arguably benefit from considering all possible staffing options to fill the position. For example, bridge employment is a term that is often invoked to describe jobs that bridge the gap between an individual's career role and full labour force withdrawal (Shultz 2003; Cahill et al. 2006). Retirement patterns have largely shifted from abrupt, and full labour force withdrawal to a more gradual process with workers either engaging in phased retirement (i.e., gradually reducing the number of hours in which they work per week) or partial retirement (i.e., choosing to work part-time instead of full-time in their current organisation). Bridge employment represents a different experience in the retirement process as it typically involves working in a new job role, new occupation, or within a new organisation (Cahill et al. 2006). Bridge employment benefits older workers in that it promotes the maintenance of health, previously held life patterns through the retirement process, and successful retirement adjustment (Zhan et al. 2009). As such, bridge employment represents a flexible staffing

opportunity available to organisations that could help attract individuals wishing to remain in the workforce. Bridge employees are especially useful to organisations as they can help to address the knowledge gap that organisations experience as their large pool of experienced and skilled employees begin to exit the workforce.

On the basis of job analytic evidence, organisations seeking to increase the age diversity of their applicant pools may consider expanding job descriptions to allow for flexible staffing methods that may be especially attractive to older applicants, including bridge employees. Flexible staffing options include flex scheduling, job sharing, part-time work, temporary work, and telecommuting. Flex scheduling is a policy that gives employees the power to set their own hours for the day, week, month or year (Naegele and Walker 2003). This increases involvement and productivity at work while allowing for better work-life balance for employees as they are given the ability to address the demands of other roles, such as care-giving responsibilities, leisure activities, and other personal issues outside of the work domain (Baltes et al. 1999; Vandenberg et al. 1999, Naegele and Walker 2003). Job sharing refers to an arrangement in which two part-time employees share the responsibilities of one full-time position (Böhm et al. 2013). This policy encourages mentoring relationships as an older employee can work with a younger employee and transfer job knowledge onto the younger incumbent (Fyock 2005). Lastly, part-time work and temporary work assignments are typically the most common flexible work arrangement pursued by bridge employees, so organisations seeking to attract these workers should implement these policies as a part of their recruitment strategy (Zhan et al. 2009; Böhm et al. 2013).

Targeting Entry-Level Applicants

While we have so far focused on recruiting for older workers specifically, increasing age diversity efforts means targeting individuals across all stages of the work lifespan. In particular, if job analytic evidence suggests that an entry-level applicant can appropriately fill a position, then the organisation's recruitment and selection system may benefit from an age-targeted recruiting effort. While there is the strong potential for stereotypes towards older workers to bias various aspects of the recruitment process, the same can be said for early career applicants (Richardson, Webb, Webber & Smith 2013). For example, early career job applicants may be stereotyped as being less dependable and less devoted to their work than older applicants (Posthumus and Campion 2008; Gordon and Arvey 2004). Evidence suggests that the perceived "age-type"

of a job (i.e., if the application calls for someone experienced vs. someone that is eager to learn) can bias preferences for older or younger workers in recruitment and selection decisions (Richardson et al. 2013). On a positive note, targeting both older and younger workers can increase the possibility for developing vertical mentoring relationships between older and younger working individuals, thus fostering generativity and knowledge transfer (Naegle and Walker 2010).

When targeting entry-level applicants, organisations should foster an image that they support development across the lifespan. For example, highlighting professional development and training opportunities signals to younger job applicants that growth is valued. If there are mentoring or career development programs in place, recruitment messages should emphasise how they help entry-level employees gain necessary knowledge and diverse skills from their more experienced colleagues (Naegle and Walker 2010). Additionally, organisations should emphasise the value of non-work experiences such as university or vocational education, volunteerism, and leadership experiences in their recruitment of entry-level employees.

Internal Recruitment

Effective succession planning is becoming increasingly important as increasing numbers of older workers retire, leaving a shortage of experienced, well-educated workers prepared to fill those vacancies (Groves 2007; Shen and Cannella 2003). As older workers retire, they potentially take with them years of institutional knowledge, experience, client bases, and skills developed during their career (Taylor and Walker 1998). Given the threat of developmental and knowledge gaps in organisations, it is worthwhile for organisational leaders to invest in employees throughout all stages of their career (Böhm et al. 2013; Naegle and Walker 2010). Pairing career development with succession planning allows for the best identification and development of current incumbents to replace retiring managers (Conger and Fulmer 2003; Rothwell 2010). Thus, organisations should adopt a lifelong learning perspective in their HRM efforts to prepare current employees to assume higher-level positions in the future.

Effective succession planning should be paired with efforts directed towards career development (Rothwell 2010). By developing and supporting employees at the beginning of their careers, organisations take a bottom-up approach to succession planning and provide employees with the tools to effectively manage their future while investing in their future leaders (Rothwell 2010). Considering their wealth of experience and knowledge in their career fields,

older workers can aid succession planning by transferring their knowledge and skill base to future incumbents (Naegele and Walker 2010). Additionally, implementation of flexible staffing options (e.g., bridge employment, phased retirement, and partial retirement) could be helpful in succession planning efforts, in that individuals taking advantage of these policies can transfer their accumulated knowledge to younger incumbents in a way that is flexible, but that facilitates closing important developmental gaps in the organisation (Böhm et al. 2013; Naegele and Walker 2010).

Organisations can take an ageing conscious approach to succession planning for both higher-level management positions and lower-level or technical job roles as well. In their efforts geared towards management succession planning, organisations should identify potential individuals for promotion, clarify developmental gaps or barriers to their advancement to such roles, and provide resources and opportunities to close gaps/address barriers by investing in individual career development plans (Rothwell 2010). This forethought can help organisations identify the incumbents that have the potential to succeed in future leadership positions (Böhm et al. 2013). Compliance from current leaders in the development of their successors can help organisations mitigate knowledge loss that could occur as incumbents retire. Technical succession planning involves similar processes to managerial succession planning (e.g., conducting a job analysis, identifying incumbents to fill the role, and transferring technical role knowledge) but focuses on lower-level technical roles that will become vacant as their older incumbents retire (Rothwell 2010). Again, older workers are instrumental in mitigating technical knowledge gaps in this process (Böhm et al. 2013; Naegele and Walker 2010; Rothwell 2010). Considering the potential strategic advantage of an age-conscious succession plan, researchers could examine the extent to which implementing this strategy helps to close developmental gaps in organisations and foster career-focused behaviours among incumbents. Additionally, future research could examine the factors that contribute to the success of these types of strategies (e.g., management support, barriers to change). In summary, an ageing conscious approach to succession planning represents an internal recruiting strategy that can help address labour shortages associated with large-scale workforce retirement.

Age-Conscious Approaches to Selection

While a well-executed age-tailored approach to recruitment should serve to increase the age diversity of an applicant pool, narrowing down that applicant pool to make selection decisions is the ultimate goal of an organisational

entry system. Next, we consider some important facets of an age-conscious approach to personnel selection. The overarching idea behind this approach is to consciously and actively value the role of experience in the planning, design, and implementation of selection procedures. This idea begins with age-conscious personnel planning and talent management (for thorough expositions, see DeLong 2004; Leibold and Voelpel 2007) and extends to how jobs are defined through job analysis and finally to various predictors that are used to support selection decisions.

Age-Conscious Job Analysis

Job analysis is a fundamental first step in the design and implementation of virtually all human resources processes, and in particular selection systems. Several distinctions can be drawn with respect to the form job analysis takes (e.g., work vs. worker oriented analysis, decomposed vs. holistic judgements regarding job elements/tasks vs. duties, etc., see Doverspike and Arthur 2012). The jury is still out regarding the relative value and utility of decomposed versus holistic judgements in job analysis (e.g., Shippman et al. 2000; Harvey and Wilson 2000). Moreover, there is still debate in the literature regarding the relative value of work versus worker-oriented approaches to job analysis (e.g. Morgeson and Dierdorff 2011; Brannick et al. 2012) versus the contributions of competency-based approaches to work analysis (Campion et al. 2011).

Despite the relatively fractured nature of this literature, there is some insight to be gained about age-conscious job analysis from examining empirical findings and best practices. Systems that accurately capture the characteristics of the job in question, balance work (i.e., task-specific) and worker-oriented (e.g., KSAs) characteristics, and that account for common factors of jobs (e.g., time spent on tasks, task criticality) are commonly cited elements to well-executed job analyses. With respect to age-conscious job analysis, an important factor is the consideration of job-relevant experience in the job analysis process. Job experience is a noted correlate of job performance (e.g., McDaniel et al. 1988a), and research has suggested that experience is a better predictor of job performance ratings than age, although evidence has suggested that there may be non-linear relationships between both age and job experience and job performance (e.g., Avolio et al. 1990).

At first glance, it would appear that valuing job experience may be an immediate benefit to older job applicants, who by virtue of opportunity have potentially accumulated more work (i.e., in terms of *duration* or *quantity*).

However, recent scholarship has suggested that evaluation of the *quality* of job-relevant experience is an important consideration as well (Baugher et al. 2014). More intricate methods of valuing the quality of job experiences may work to the benefit not only of older applicants but also younger applicants with less duration/quantity of experience, but who may have accumulated quality experiences through engagement in education, internships, and volunteerism (among others). Moreover, valuing experience in the job analytic process can easily be linked to the decisions around the design of tools to facilitate the personnel selection process. Three specific examples are noted here—biographical data, training and experience (T&E) evaluations, and experience-based structured interviews. These three examples represent predictors that emphasise and value a range of experiences.

Biographical Data

Biographical data (biodata) is a selection method that asks applicants various questions about their life and work experiences that reflect a historical perspective, including questions that may involve opinions, values, beliefs, and attitudes. The emphasis here is on the use of biodata methods to appropriately weight experience duration and quantity along with quality. Schmidt and Hunter (1998) suggest that biodata measure have high validity ($\rho = .35$) with respect to predicting job performance. Furthermore, the theoretical assumption that underlies the use of biodata instruments is well-established (see Mumford et al. 2013), and most basically asserts that the past instances of work-related behaviour should be related to future instances (see also Stokes et al. 1994). In practice, biodata questions can be quite broad (e.g., past experiences in general, personality, attitudes, interests); however, more experience-based biodata measures may be particularly helpful in this given context (e.g., focusing on past *work* experiences, education, and training). Moreover, biodata measures can be scored using both rational and empirical means or with hybrid approaches (e.g., unit-weighting) that combine desirable qualities of each method (see Cucina et al. 2013).

Training and Experience Evaluations

A related selection method, T&E evaluations, has demonstrated validity with respect to predicting job performance (McDaniel et al. 1988). Similar to biodata methods, T&E evaluations attempt to quantify past experiences in

that they generally involve applying a systematic means of assessing previous experience, educational backgrounds, and other training information that is provided by job applicants. This information is typically collected as part of a supplement to a standard job application blank, which can then be compared against benchmarks for a particular position, and scores can be derived for the purposes of selection. The idea is to appropriately weight critical factors related to the past experiences which are important for the particular job requirements that have been identified by job analysis (Lyons 1988, 1989).

T&E evaluations are particularly useful for initially screening applicants for entry-level positions, and as such could represent an important method for ensuring the age diversity of an applicant pool with respect to younger employees. However, extensions of the basic weighting strategy can be applied to more complex jobs at higher levels (e.g., McCauley 1987). For example, task-based methods can be applied to assess T&E, for example, by asking applicants to indicate whether or not they have ever performed a number of tasks that are part of the job they are applying for. Such tasks are derived from a list of critical job elements that are identified from job analysis and incumbent input. More broadly, a competency-based method can also be applied, in which applicants are asked to rate the extent to which they possess requisite KSAs and relevant past experiences to address critical job competencies that have been identified through job analysis. Beyond simply identifying one's level of experience in engaging in a particular set of competencies, applicants are asked to provide behavioural evidence of personal accomplishments that illustrate their proficiency on these critical job dimensions to support their self-reported evaluations (see Giffin 1989). Considering these methods, a study by Baugher et al. (2014) used a KSA-based approach to T&E evaluations similar to the task-based strategy to T&E evaluations. Raters judged the quality of applicants' job-relevant experience. Results support the validity of this approach and suggest that using multiple raters increases both the reliability and criterion-related validity of quality-based T&E evaluations.

Experience-Based Structured Interviews

Job experience is perhaps most often evaluated through structured job interviews. The literature on the process of structuring pre-employment interviews is well established (see Campion et al. 1997 for a review). Regarding the development of structured interview questions, best-practice recommendations suggest that interviews should balance experiential questions, including behavioural descriptions of past actions and results (e.g., "What did you do when...?"),

along with the critical analysis of hypothetical situations (e.g., “What would you do if...?”; see Judge et al. 2001). Experience-based interviews (e.g., McCarthy et al. 2010; Roth and Campion 1992) typically involve asking applicants to answer questions about their qualifications, including work experiences and educational background. The notion of asking such questions again rests on the assumption that the best predictor of future behaviour is past behaviour, in a similar context. Thus, asking interviewees about past instances of behaviour that have occurred in work contexts, and that are relevant to a particular job, should result in better predictions regarding one’s capacity to perform relevant job tasks in the future.

Experience-based interview questions are inherently past-oriented, as they ask respondents to relate accumulated work and life experiences to job-relevant knowledge, skills, and abilities that are required of successful employees (Pulakos and Schmitt 1995; Janz 1982; Motowidlo et al. 1992). In designing structured interviews, striking a balance between situational and behavioural interview content is important. For example, several primary studies (e.g., Campion et al. 1994; Pulakos and Schmitt 1995) have found evidence for the superiority of behavioural interviews over situational interviews, with respect to criterion-related validity. However, a meta-analysis by McDaniel et al. (1994) suggested evidence for the *opposite* effect (i.e., higher validity for situational interviews). Some caution should be applied in interpreting this particular result, however, because this study collapsed behavioural interviews into larger category, classified as “other job relevant” interviews, thus providing for no direct comparison.

Mitigating Age Bias via Active Intervention

Active age management through policy and procedure is one viable strategy for addressing ageism and age bias in organisational entry processes. One step towards developing an expanded view of age management with respect to organisational entry is the identification and/or development of active means of ensuring that age bias is mitigated at various decision points within the entry process. One particularly relevant approach to this idea would be to identify and actively apply psychologically based interventions that serve to reduce the impact of age bias, through the reduction of ageing stereotypes or their impact of judgemental outcomes.

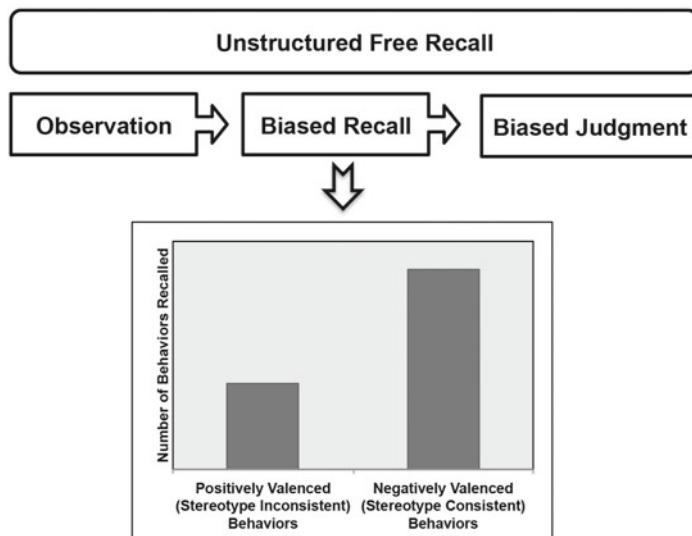
One possible means of mitigating the impact of ageing stereotypes in the organisational entry process is by implementing interventions designed to inform decision makers of their biases as a means to reduce discrimination.

For example, an organisation may develop a stereotype identification training program that has raters' complete stereotype measures and discuss the implications of their stereotypes for different decisions in the workplace. This type of intervention could serve as an important means to educate and inform key decision-makers; however, research evidence suggests that the effectiveness of such interventions for rectifying discrimination is relatively limited. For example, interventions that are designed to help evaluators control their biases and to be more accurate are often unsuccessful at bias reduction, and have even led to inadvertent "rebound effects" where one's biases are more powerful than before intervention (Bodenhausen and Macrae 1996; Wegner 1994; Macrae et al. 1994). One possible explanation for this ironic effect is that people are generally unaware of the extent to which their prejudicial beliefs influence their judgements, because such cognitions and the process by which they affect action are generally considered to be unconscious (see Devine and Elliot 1995; Dovidio and Gaertner 1996).

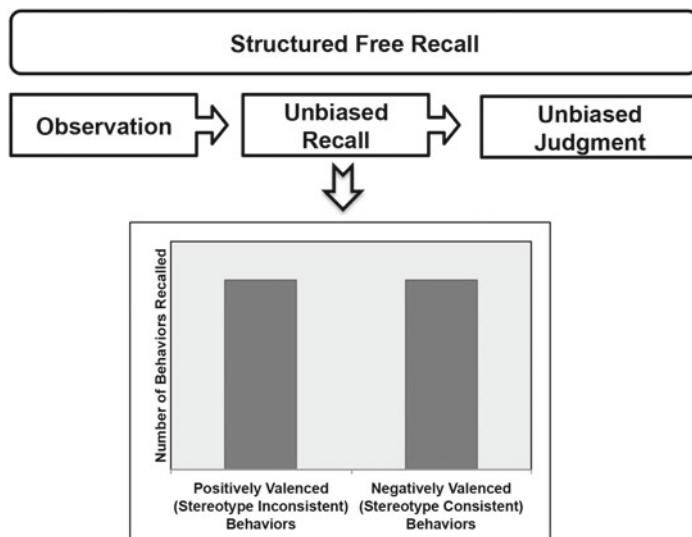
Stereotype identification interventions raise an additional issue that is particularly relevant to how we understand diversity practice – namely identifying certain decisions makers who possess the capability to make biased decisions is problematic for organisations on both legal and ethical grounds. For example, once organisations have this information, how do they manage "biased" individuals? It would seem troublesome to proactively act upon the *potential* for one to engage in overt discriminatory behaviour, particularly in light of evidence from a line of research that suggests that people can actively control prejudice (e.g., Plant and Devine 1998). For example, Devine et al. (2002) show that while individuals may endorse a stereotype, they will regulate their responses to not exhibit prejudiced behaviour if they have sufficient motivation to control prejudice. More effective interventions for reducing ageism in organisational entry processes have been identified however. One example, the SFRI (Bauer and Baltes 2002; Baltes et al. 2007; Rudolph et al. 2012) may be particularly valuable at mitigating age-biased selection decisions.

The SFRI is a *recall-driven* intervention. This is unique, in that many interventions that are used in similar contexts are *encoding-driven* (e.g., Rater Error Training, Frame of Reference Training; Sulsky and Day 1992, 1994). The SFRI reduces the impact of stereotypes in evaluative decision-making by structuring the process by which performance-relevant behaviours are recalled *prior* to making judgements. A threshold cognitive model (see Baltes et al. 2007) can explain the effectiveness of the SFRI (see Fig. 25.1). Consistent with information processing theories, the threshold cognitive model suggests that stereotypes are cognitive heuristics that affect how strongly specific behaviours are encoded into memory, and stereotype-consistent behaviours result in stronger memory representations than stereotype-inconsistent behaviours.

Panel "A"



Panel "B"

**Fig. 25.1** Comparing the unstructured versus structured free recall process

The recall process typically occurs via an unstructured mode. Thus, biased evaluators are more likely to recall stereotype-consistent behaviours because these behaviours are better represented in their memory. Subsequently, this biased recall of behaviour likely has an undue influence on evaluations of

performance potential (see Fig. 25.1, Panel “A”). The SFRI structures the recall of behaviours to circumvent this process. Specifically, the SFRI modifies the retrieval threshold for performance-relevant behaviours by explicitly structuring the process by which raters recall both positive *and* negative behaviours. What this ultimately means is that evaluators undergoing the SFRI have equal access to both stereotype-consistent and -inconsistent behaviours. As a result, evaluators rely less on heuristic processes and are able to translate these behaviours into judgements in a way that is less biased by the influence of stereotypes (see Fig. 25.1, Panel “B”).

The SFRI could be implemented as part of various selection processes to mitigate the impact of age stereotypes on employment decisions. For example, the SFRI can be used immediately following a pre-employment interview to reduce the impact of stereotypical assumptions on interview ratings and associated employment decisions. During an interview, a rater has limited access to performance information and may thus rely on more heuristic processes to make hiring decisions (Rudolph et al. 2012). If used shortly following an interview, the SFRI guides raters to recall and explicitly account for observed behaviours that relate to the performance dimensions identified during a job analysis and assessed via the interview protocol. Thus, the rater relies on performance and qualification-related behaviour rather than more heuristic/stereotypical assumptions about an applicant when forming their evaluation. Additionally, the SFRI could be similarly implemented in assessment centre or job-simulation settings used for selection purposes. Raters in these settings often view multiple applicants and are similarly exposed to limited performance information for any given individual, potentially leading to the reliance on more stereotypical assumptions when forming performance judgements. The SFRI could be used shortly after a rater views the performance of an applicant to aide in the recall of relevant performance-related behaviours. When implemented in this type of setting, evaluations of applicants should reflect less biased judgements (i.e., with respect to stereotypes) (Fig. 25.1).

General Discussion and Concluding Thoughts

In this chapter, we presented an expanded view of age management in the workplace and demonstrated how it could be used to help shape various decisions that occur during recruitment and selection. Furthermore, by doing so one should be able to mitigate age-related processes that might lead to ageism for workers of all ages. More specifically, we believe age management provides

one with a set of guidelines that specify best practices for actively managing age across a number of organisational processes. With respect to recruiting, we suggested several ways in which one could make sure to attract candidates of all ages for various positions. Organisations can ensure age diversity by recruiting both older and younger workers. It is necessary to recruit individuals from across the lifespan as workers from each stage represent unique opportunities for organisation effectiveness. Older workers possess unique skills, experiences, clients, and knowledge accumulated throughout their career. Younger workers, though less experienced, are similarly qualified and represent an opportunity for the organisation to develop these entry-level applicants early in their career.

Another decision made during the recruitment process regards using an organisation image and presence to attract employees. Promoting an age-friendly presence is integral in demonstrating the value an organisation holds in successful ageing across the lifespan. However, we emphasise the importance of doing so in a genuine fashion (i.e., organisations should advertise an age-friendly work environment only if it is an accurate representation of the experience within the organisation). The age-management literature underscores the value in conducting an age diversity audit from its HR managers, older employees, and managers to get a better understanding of the current state of age-related processes at work prior to making recruitment and selection strategy decisions (Böhm et al. 2013). Age-management principles can similarly be applied to succession planning. In order to prevent knowledge gaps as older workers retire, organisations can implement age-conscious succession planning. This can take the form of involving older workers in mentoring relationships, knowledge transfer, and job sharing. Additionally, organisations could recruit non-traditional applicants (e.g., bridge employees) to help fill developmental gaps while preparing younger incumbents to fill new job roles. Overall, age-management policies can improve recruitment strategies in increasing age diversity.

With respect to the selection process we discussed using an age-conscious approach to selection where the organisation should approach all components of the selection process consciously and actively value the role of experience (as well as other positive aspects of both older and younger employees) in the planning, design, and implementation of selection procedures. During the planning stages of creating selection batteries, we emphasise the importance of completing age-conscious job analyses (i.e., taking into consideration job-relevant experience). This strategy aids in the development of selection tools that assess the quality of applicant job experience. We recommend utilising biographical data, T&E evaluations, and

experience-based structure interviews to ensure the quality and age diversity of one's applicant pool. For example, T&E evaluations help to screen entry-level applicants by asking individuals about their previous experience with tasks critical to the job. Finally, we discussed using active interventions to reduce age bias in selection and promotion decisions. The use of intervention such as the SFRI should reduce the impact of negative stereotypes of both older and younger workers.

The ideas presented here should perhaps be expanded further to include considerations of age-conscious job design. For example, Truxillo et al. (2012a, 2012b) have recently proposed integrated lifespan models of job design that identify specific job characteristics that are likely to be important to individuals across various career stages (e.g., task characteristics—such as autonomy and skill variety; social characteristics—such as interdependence and social support). Truxillo and colleagues suggest that age-conscious job design is a core facet of effective age management. The age-tailored approach to recruiting and selection that is offered here would certainly be supported by job design approaches that implement age-conscious work characteristics. Moreover, age management must be a holistic effort to incorporate age consciousness not only into recruitment and selection strategies but also into all HRM practices such as lifelong learning policies and practices, flexible work options, health and safety management, and retirement planning. Age-management principles emphasise that age diversity and successful ageing should be considered in all aspects of the employee experience. Here, we offered age-conscious perspectives on organisational recruitment strategies to mitigate age barriers and promote equal opportunity for employment to all individuals across the lifespan. Furthermore, we expanded on the previous age-management literature to emphasise the importance of, and provide recommendations for, age-conscious practices in the selection process to prevent age bias in selection decisions, thereby safeguarding age diversity efforts.

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26

Designing Effective Training for Older Workers

Kurt Kraiger

As the workforce ages, retaining talent, creating career paths to help senior employees break out of career plateaus, and maintaining development across the life span at work creates special challenges for organizations. Yet, few organizations have policies or practices in place to capitalize on the advantages of not only hiring but also retaining (and retraining) older workers. This chapter focuses on the challenges of training older workers as well as how to effectively design training and development interventions given these challenges. As such, the goal of the chapter is to promote human resource development interventions that enable learning, learning transfer, and retention of key talent in organizations across the globe.

Aging Workforce and Training

The impact of changing demographics and the changing nature of work are generating increasing interest in the training or retraining of older workers (Beier et al. 2012; Moseley and Dessinger 2007; Rothwell et al. 2008). Specifically, challenges and opportunities for training older workers are defined by the confluence of four trends: (1) the workforce is aging, (2) the

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supply of jobs and (3) the nature of jobs available to older workers is changing, and (4) the nature of training is changing. Together, these influences suggest that the need to effectively train older workers has never been greater. Hence, there is a need to better understand the challenge and opportunities of training an older workforce. Each of these trends is summarized below.

First, it is well-known that the workforce is aging. As Baby Boomers remain a significant proportion of the total workforce (Society for Human Resource Management 2009), the mean age of the workforce increases. It is estimated that by 2018, individuals 55 and over will comprise approximately one-fourth of the American workforce (Toossi 2009). In the European Union, the percentage of workers over age 50 is projected to increase by almost 25 per cent over the next 10 years ("Turning boomers into boomerangs" 2006). Additionally, the percentage of older workers in the workplace is being driven up by individuals staying active longer in the workforce. In a recent review of supporting an aging workforce, Truxillo et al. (2015) hailed the good news that people are aging more slowly (Vaupel 2010) and thus working later into life (Toossi 2012). Much of the motivation is financial—the need to strengthen personal retirement resources and to sustain one's self through a longer retirement (Truxillo et al. 2015). However, complete disengagement from work is becoming more gradual, with increasingly higher percentages of employees working past retirement age (Eurofound 2012; U.S. Bureau of Labor Statistics 2016a) or choosing different work assignments (e.g., temporary or part-time) to remain employed (Zaniboni et al. 2015). In sum, more workers are postponing retirement, retiring and then returning to work, or engaging in "bridge employment" (Schultz and Adams 2007). The sum effect is that there is a higher percentage of older workers than ever before. More importantly, the transient nature of many of these jobs means that many older workers are having to be trained for novel jobs or roles.

Second, jobs available to older workers are changing. As noted above, older adults often transition into temporary or bridge jobs in order to postpone retirement or maintain income. Additionally, systematic downsizing and organizational restructuring due to economic strains in recent years have resulted in a large percentage of workers needing to learn new skills to stay employed (Carbery and Garavan 2005). While all workers are threatened by downsizing, since older workers are typically more highly paid, they may be more vulnerable to cost-saving efforts. Further, some research suggests that the more likely an organization is to downsize, the less likely they are to be engaged in human resource practices tailored to older workers (Armstrong-Stassen and Cattaneo 2010). Thus, older workers are at greater risk of losing

their primary jobs and require training or retraining to do similar work either in their current organization or industry.

Additionally, jobs available to older adults are likely to be different from those they attended school for, trained for, or acquired expertise in. For example, it is predicted that manufacturing and agricultural jobs will decrease in coming decades in the USA, while health care, retail, and technology jobs will continue to grow (Bureau of Labor Statistics 2016b). Thus, for example, an older worker who was a skilled laborer may need computer training for his or her next job. Also, nearly all jobs have been changed—and are in the process of being changed—by advancements in technology. Cash registers were replaced by computers which are now being phased out by smartphones. Telephone repairmen who once climbed poles to fix a broken line now reroute telephone transmissions via computer. And, the wide availability of office software and online applications has reduced the need for typists, researchers, travel agents, and so forth. Consequently, there is a need for employees to continually stay current in relation to technology knowledge and skills just to maintain current proficiency on the job (Judy and D'Amico 1997; Society for Human Resource Management 2009). In sum, the changing nature of jobs and jobs likely available to older workers will create tremendous pressure on organizations to provide effective training.

Third, the training available to older workers is changing as well. Not surprisingly, organizations are increasingly relying on technology-based instruction in training (Kraiger and Ford 2006). In the USA, as much as one-third of all corporate training is now delivered online (Miller 2014). Additionally, mobile devices such as tablets and smartphones are also becoming increasingly popular methods to deliver learning content, combining the benefits of personalized learning and just-in-time learning (e.g., de-Marcos et al. 2010; Peng et al. 2009). Thus, older workers (and all workers more generally) face the likely Catch 22 of having to rely on technology to learn how to work with technology.

Additionally, the training terrain is shifting as well. The last 30 years has seen a rapid increase in training research (Aguinis and Kraiger 2009; Salas and Cannon-Bowers 2001), and, more recently, the translation of training research into principles and guidelines for more effective instruction (Clark 2014; Dunlosky et al. 2013; Salas et al. 2012). Thus, the Science of Training is poised to offer empirically supported tactics for enhancing and learning, at the same time that organizations are increasingly likely to look to training as part of an integrated human capital management strategy embedded in an age-inclusive organizational context (Noe et al. 2014).

The objective of this chapter is to support the effective design and delivery of training for older workers. The chapter is organized as follows. Immediately following, I define and set boundary conditions on key terms used throughout the chapter (e.g., training and older workers). Following this, there is a brief review of the literature on the effectiveness of training for older workers, including the impact of attitudes and motivation of older adults on training outcomes. Then, I offer prescriptions for training practices that include both age-specific and age-general recommendations.

Training Older Workers: Key Definitions

Training refers to intentional activities leading to the acquisition of knowledge, skills, and attitudes (KSAs) relevant to an immediate or upcoming job or role (Kraiger and Culbertson 2013). Training is usually distinguished from development in that the latter is reserved for activities that target KSAs for *future* roles. However, for purposes of this chapter, I will focus on any planned activity that is intended to affect job-relevant knowledge and skills. In defining training, I would like to emphasize the intentionality of the activities—some intervention is planned and carried out to benefit the learner. This emphasis recognizes that there can often be learning without training, for example, vicarious learning (see Cerasoli et al. 2014). However, such events are outside the scope of the chapter. It's also worth noting that there can be training without learning! Usually this occurs because the training is poorly planned and delivered, or trainees are unmotivated. An implicit purpose of the chapter is to minimize occurrences of training without learning for older workers.

By focusing on workplace training, I will generally exclude a large body of literature that often targets older adults—so-called brain training or memory-enhancement training. The former refers to systematic interventions intended to improve or maintain cognitive functioning such as reaction time, working memory (WM), and processing speed (see Kueider et al. 2012 for a review). The latter refers to similar interventions that directly target recall and recognition (see Floyd and Scogin 1997; Zehnder et al. 2009, for reviews). While all such interventions have demonstrated positive effects on older adults and could lead to improved job performance, they also differ in important ways from typical organizational training. Specifically, training episodes are usually initiated by the learner, occur in non-working hours, and focus on cognitive functioning as opposed to job-related skills. While there are a few instances in which I draw support for *workplace* training propositions, in general, these literatures are not drawn on for the purposes of this chapter.

To return to workplace training, it can be broken down into both formal and informal components. In formal training, training normally occurs for a fixed period of time, with defined learning outcomes and some planned activities. Common examples are classroom-style training and technology-distributed instruction (TDI; e.g., e-learning). Through informal training, learning occurs through both planned and unplanned activities on-the-job (OTJ) such as job shadowing, modeling, and providing feedback (Tannenbaum et al. 2010). As noted by Tannenbaum et al. (2010), while the context and activities differ, many of the key components that facilitate learning (e.g., practice, feedback, and reflection) are similar between formal and informal contexts. For the purposes of this chapter, I will be principally referring to formal training delivery; however, it should be recognized that many of the previous findings and new propositions apply as well to informal contexts.

Older Worker As noted elsewhere in this volume, there is tremendous variability in the literature with respect to who is defined as an older worker. In a review of age in the training literature, Williams van Rooij (2012) noted that *older workers* were defined as anywhere in age from 35 to 60. However, Truxillo et al. (2015) provided a different range, defining an older worker as one either approaching retirement age or perhaps working just past the standard retirement age. Thus, they suggested that older workers were those in their late 50s and 60s.

The complexity of defining older workers is exasperated by age stereotypes and differences in aging processes. For example, Perry et al. (1996) noted that there are different age stereotypes for different jobs, and with respect to training, those stereotypes matter. Beier et al. (2012) argued that because age stereotypes are often about how older adults learn (Ng and Feldman 2008), they can affect training opportunities provided to older workers (Warr 1993; Warr and Birdi 1998), as well as their performance in training (e.g., Cavanagh 2011; Hess et al. 2003).

It is generally acknowledged that there is considerable variability within various age cohorts (Hertzog et al. 2008), thus cognitive or physical declines seen in one 50-year-old worker may not be evident in a co-worker who is 60. Additionally, individuals seem to be aging more slowly than in past decades (Vaupel 2010), so that conclusions about who is “old” may change in the future. That said, it is also apparent that there are numerous physical and cognitive changes that occur over the adult life span (Kanfer and Ackerman 2004), and while some may have positive effects for training performance, others may create challenges both for the older adult in training and for the

designer responsible for training. I summarize some of these changes below. The point here though is that the onset and/or acceleration of physical and (in particular) cognitive changes should be useful for defining the lower end of an age range for defining the older worker. The upper end can be defined by the age at which the majority of workers are no longer in need of workplace training—that is, they are at or slightly beyond retirement age. Given differences in retirement ages across industrialized nations, and given differences in onset ages by physical or cognitive attributes, even these boundary points become fuzzy.

However, for purposes of this chapter, I define an older worker as someone between the ages of 50 and the upper 60s, with full appreciation for individual aging patterns across ages and large variability for specific ages. Consistent with the impact of excluding brain and memory training from consideration above, an implication of this age range is that I will generally exclude research on adults over 70 to support subsequent propositions.

Cognitive and Motivational Changes in Older Learners and Implications for Training

First, it is important to note that age-related differences in training performance are the norm, although age effects do not extend to job performance (Ng and Feldman 2008). While it is now somewhat dated, the definitive source on age effects in *job-related* training is Kubeck et al. (1996). The researchers examined 32 studies and 83 effect sizes examining the effect of participant age on training outcomes. In studies that correlated participant age to outcomes, Kubeck et al. found a ρ of .26, indicating the older the worker, the less the mastery of the training content. Additionally, they reported a ρ of .42 between age and time to complete training, indicating older workers require more time on task. In studies that compare training outcomes across groups of younger and older learners, they found even larger effects (favoring younger learners) of $d = -.88$ for training mastery and 1.39 for time to complete. Kubeck et al. speculated on several causal mechanisms that might account for the age effects, including slower processing speed and reduced WM capacity.

Thus, it is important to summarize likely physical, motivational, and cognitive changes in adult learners before addressing training implications. Since the objective of training is to facilitate learning (Kraiger and Culbertson 2013), and since the cognitive processing of learners is the most important determinant of successful training (Ford and Kraiger 1995), more emphasis is

placed here on cognitive changes. However, physical changes are also important. If a trainee's hearing and vision diminishes with age, from a practical perspective, it would be critical to make accommodations for this in designing the training environment.

A full review of physical, motivational, and cognitive changes in older adults is beyond the scope of this chapter. Further, they have been well addressed in other sources (e.g., Beier et al. 2012; Kanfer and Ackerman 2004; Rizzuto et al. 2012; Truxillo et al. 2015). However, for purposes of understanding the effects of aging on training performance, the primary factors are likely as follows.

Cognitive Processing Speed One of the more well-accepted effects of aging on cognitive processing is slower reaction time and longer times required to process new information. For example, multiple studies have shown that older adults have slower reaction times (Cerella 1990; Salthouse 1993). Further, Salthouse (2003) reported a strong negative correlation between age and performance on cognitive speed tasks. Theoretical work (Salthouse 1996) proposed that reduced cognitive process speed may be a mediator between chronological age and performance on cognitive tasks (such as training). Further, reduced cognitive speed may be linked to other forms of cognitive decline, such as the diminution of WM capacity (Salthouse 1996). WM is critical to the exchange of information from sensory memory to long-term memory. Since WM capacity can be extended through rehearsal, slower processing speed may limit capacity to refresh and rehearse new information, leading to early mental operations decay prior to associations being built with long-term memory structures. In short, slowing processing speeds—a characteristic of older learners—makes it more difficult to acknowledge, encode, and act upon novel information, particularly when learners cannot self-pace.

WM Capacity WM is not only critical to the maintenance and manipulation of information necessary for comprehension and learning (Baddeley 1992), it is associated with many other critical higher-order cognitive processes such as meta-cognition, monitoring, and goal-directed behavior (McCabe et al. 2010). While WM capacity begins to decline as early as one's 20s, it continues to decline across the adult life span (Bopp and Verhaeghen, Bopp and Verhaeghen 2005). WM refers to "a system for the temporary storage and manipulation of information, necessary for the performance of such complex cognitive activities as comprehension, learning, and reasoning" (Baddeley 1992: 255). WM is one of the fundamental components of cognitive

functioning and is associated with performance on a broad range of cognitive tasks involving memory, reasoning, judgment, and following directions (Park and Payer 2006). WM is also associated with higher-order cognitive processes such as the control of complex cognition, monitoring and regulating performance, and goal-directed behavior (McCabe et al. 2010). Using meta-analytic data, Bopp and Verhaegen showed that age effects on WM tasks increase with increasing storage requirements. Thus, we might predict smaller differences between younger and older learners on simpler tasks, but would see larger differences on more complex tasks. As discussed below, the dual impact of task complexity and information density can have important implications for training design.

Attention and Ability to Coordinate and Integrate Information As any instructor knows, learners who do not or cannot pay attention are less apt to master learning content. Attentional resources are assumed to diminish with age, and, as a result, older adults typically perform worse than younger adults on tasks requiring attention (McDowd and Shaw 2000). However, as discussed by Rizzuto et al. (2012), the general topic of attention can be subdivided into two attention functions with implications for training older workers: selective and divided attention.

Selective attention occurs when the learner ignores less-relevant information (e.g., background noise or distractions) and instead attends to important task attributes. Generally, learners become more susceptible to interfering or non-relevant information as they age (McCabe et al. 2005). Specifically, as adults age, they have a decreased ability to inhibit irrelevant information and are more susceptible to distraction (Hasher et al. 1999; Kim et al. 2007). Thus, older adults are predicted to be at a disadvantage when learning goals are not evident or distractions are high (e.g., OTJ training or noisy classrooms).

Divided attention requires individuals to switch rapidly between competing task demands and attend to both, for example, navigating an online help forum while talking to a customer. While considerable research suggests that older adults perform worse than younger adults in dual-task studies (e.g., Anderson et al. 1998), this may be less due to their (poorer) ability to divide attention than simply age effects on performance on either tasks. For example, Allen et al. (2002) found no differences in performance levels between younger and older workers, but slower speeds for the former. Further, Salthouse et al. (1995) found that age effects in dual-task performance can be reduced drastically by controlling for single-task performance (which in turn was explained by slower processing speeds among older participants). While divided

attention effects may not be as large as once assumed, it remains possible that older learners would be at a greater disadvantage when training competes with other demands on attention such as everyday job responsibilities.

Finally, aging is associated with a reduced capacity to integrate different sources of information (Mayr and Kliegl 1993), particularly on tasks that require both retention and processing of information (Mayr et al. 1996). Such tasks are typical of many training contexts, in which learners must solve problems or respond to feedback while inferring lessons learned. Once such example is error training, in which learners are encouraged to make errors performing a task, but distill correct procedures from feedback and/or reflection. Not surprisingly, Carter and Beier (2010) found that while younger adults performed well on low-structure error training, older adults tended to benefit from higher structure. Presumably, the greater structure reduced processing demands and aided in the integration of information toward retention.

Motivational Effects Finally, it is important to address motivational changes associated with aging. Here, the news is better for older adults. For example, both emotional and affective regulation tend to improve with age (Scheibe and Zacher 2013). Scheibe and Zacher suggested that older adults appraise stressful events less negatively than do younger counterparts, and also focus more on positive rather than negative environmental cues. Thus, in relation to the extent of learning new information in training, older workers may be better able to regulate their reactions to that strain. Thus, the tactic of creating “desirable difficulties” (Bjork 2013) for older adults may be beneficial.

A key factor to be considered is older adults’ motivation to learn. Motivation to learn is a high state of arousal and intent to learn due to learner perceptions that they master the material, the training content is relevant, increased job performance is valued, and the workplace is supportive of growth (Noe 1986). Trainee motivation to learn is one of the stronger predictors of learning in training (Colquitt et al. 2000). However, Warr and Birdi (1998) presented data suggesting that trainee motivation for learning declines with age, though their research focused more on motivation for voluntary developmental activities. However, Kanfer and Ackerman (2004) also argued that training motivation may decline with age since age is also associated with a reduction in fluid intelligence. Fluid intelligence is important for analyzing novel problems, detecting patterns, and so forth, activities common in many training programs. Thus, Kanfer and Ackerman suggest that older workers may perceive training as novel and demanding, and thus have lower motivation to participate.

The Kanfer and Ackerman (2004) argument suggests that low motivation may, in part, be due to low self-efficacy on the part of older learners. In other words, instead of the cause for low motivation being that the training is too difficult, it could be that older learners believe they lack the cognitive resources to complete the training. Self-efficacy as a predictor of trainee motivation (and training performance) is one of the most robust effects in the training literature (e.g., Chen et al. 2000; Mathieu et al. 1992). In general, trainees who are higher in self-efficacy are more likely to attempt, persist in, and succeed at training tasks. Self-efficacy for learning and development activities has been found to be lower for older adults than younger adults (Maurer et al. 2003; Touron and Hertzog 2004) particularly if training is computer based (Czaja et al. 2006; Marquie et al. 2002).

Motivation to learn is also related to the perceived utility of training (Salas et al. 2012). Malcolm Knowles has long argued that the adult learner must understand the personal relevance of the training in order to be optimally motivated to learn (Knowles et al. 2014). Williams van Rooij (2012) has argued that older workers are less likely to be motivated to learn if they do not fully appreciate the utility of training. Similarly, Callahan et al. (2003) suggested that motivation to learn is greater in older workers when the relationship to relevant work problems is clear. However, even if the relationship between job requirements and training objectives is clear, older workers may have lower perceptions of training utility than do younger workers. Zwick (2011) speculated that older workers' motivation to participate in training may be lower than that of younger workers because they see fewer long-term financial benefits. That is, younger employees may see long-term benefits over a career for the accrual of new skills.

The distinction between short-term and long-term benefits as a determinant of training motivation calls to mind Carstensen et al.'s (1999) socio-emotional selectivity theory (SST). As readers likely know, Carstensen et al. propose that one's sense of time is based on perceived time left, not time spent. As workers age, perceived time left diminishes, with consequences for the selection of, and pursuit of goals of knowledge acquisition and emotional regulation. SST predicts that activities that promote knowledge acquisition (like training) are more desirable for younger adults, while activities that address emotion-related goals are more attractive to older adults who perceive time as limited. Thus, a prediction following SST is that training would be perceived more positively among older workers (thus resulting in higher motivation to learn) if it were framed in terms of emotional goals rather than knowledge acquisition goals. For example, one advertised benefit of training could be better interpersonal relationships with co-workers

given common skills and a common (work) language. In support of this, a meta-analysis by Kooij et al. (2011) found a positive relationship between age and intrinsic motivation including a sense of accomplishment, but a negative relationship between age and extrinsic motivation such as opportunities for advancement. The lesson here is that the motivation to learn of older workers may be less an issue of overall arousal, but more about how they see training benefitting them.

In sum, while acknowledging individual differences in both the rate and type of cognitive decline associated with aging, there are multiple ways in which we respond to learning tasks less effectively as we age. While these effects may be less noticeable for workers in their early 50s, they will tend to be greater for trainees in their mid- and upper-60s. Similarly, there is evidence that motivation to learn and self-efficacy may decline with age, although it could be argued that older workers' motivation simply changes or is based on different factors than is the motivation of younger workers. As discussed below, these effects have implications for training design.

Training Interventions

The Debate on Age-Specific versus Age-General Training

As noted above, existing meta-analytic evidence suggests a main effect for age—given a set instructional environment, older employees will, on average, learn less than younger ones (Kubeck et al. 1996). Kubeck et al. speculated that these effects may be due to primarily declining cognitive abilities, and, in the prior section, I detailed both cognitive and motivational factors that differentiate younger and older learners. Thus, one could argue that it is cognitive and/or motivational variables that account for age effects in training. The question then becomes, what to do about it?

Philosophically, there are two approaches to addressing the issue—age-specific and age-inclusive training (Williams van Rooij 2012). Age-specific training includes forms of training that are designed to minimize or limit cognitive (or physical or motivational) limitations (e.g., Fisk et al. 2009). For example, training content could be presented at a slower rate or in smaller chunks of information to limit the effects of slower processing speed and reduced WM. Williams van Rooij suggested that by “drawing on the fields of gerontology, cognitive psychology, and instructional design, proponents stress the need to understand barriers to learning such as health factors, cognitive changes affecting memory and concentration, and opportunities for

successful knowledge transfer that fit older worker learning preferences and attitudes toward learning as a means of empowerment and self-actualization” (p. 286).

Further, Hickman et al. (2007) argued more forcibly for age-specific training, indicating that many prior studies show that new training programs are not similarly effective for both (e.g., Mead and Fisk 1998; Hickman et al. 2007; Sanders et al. 2002). For example, training programs that emphasize high practice variability (see Schmidt and Bjork 1992) might create higher cognitive load for older learners. Further, to the extent that training involves computers, and older adults either lack experience or feel high anxiety about working with computers, it may be necessary at a minimum to pre-train older learners on using the computer (Morrell et al. 2000).

In contrast, Van Gerven et al. (2006b) have argued against age-specific training design. Specifically, Van Gerven et al. contended that age-general research-based instructional principles should benefit learners of all ages—well-designed training works (Salas et al. 2012). Further, Van Gerven et al. suggested that while sound instructional design is beneficial to all age groups, it should be particularly beneficial to older adults than younger adults. This is because older adults need more learning support (e.g., Craik 1986) and perhaps have more room for improvement. Good training consists of tactics such as: (1) clearly understood objectives and intended outcomes; (2) relevant content exercises, examples, and assignments; (3) helpful instructional aid to organize, learn, and recall content; (4) opportunities to practice in a safe environment; (5) well-timed, multisource feedback; and (6) opportunities to interact with and learn from other trainees (Noe and Colquitt 2002).

Though there are counterexamples (training interventions that work better for one age cohort vs. another), multiple studies show that the implementation of sound instructional principles have significant effects on both younger and older learners (e.g., Jamieson and Rogers 2000; Kornell et al. 2010; van Gerven et al. 2006a). To test Van Gerven et al.’s (2006a) assertion that such principles should be primarily helpful to older adults, Wolfson and Kraiger (2014), testing learning in a sample of younger and older adults who were either exposed or not exposed to an advanced organizer (Mayer 1979), intended to clarify the instructional objectives and help trainees organize (and learn) new material. Consistent with the age-general approach, the advanced organizers helped both younger and older adults learn the material, but had a significantly greater impact on older trainees.

So, the question remains, which is better—age-specific or age-general training interventions? From a design perspective, the simple answer is both. Instructional designers have the professional responsibility to incorporate

best practices into the design of training programs (Rothwell and Kazanas 2004), and sound training, as argued before, should result in both younger and older learners (Dunlosky et al. 2003; Kueider et al. 2012; Wallen and Mulloy 2006). Thus, with well-designed training, all learners should improve. And, to the extent that van Gerven et al. (2006a,b) are correct, that training should benefit those who generally perform lower in training—older adults.

At the same time, there is no reason why small or reasonable changes to training delivery cannot be made to accommodate older learners. The advance organizer manipulation used by Wolfson and Kraiger (2014) was a single slide with the training objectives at the beginning of the presentation. Since it is known that hearing and vision typically decline with age (Charness and Czaja 2006; Hedge et al. 2006), providing, say, volume or font control in TDI is a simple tactic to provide the same training to all learners, but accommodate the special needs of older learners. Additionally, because there do tend to be differences in cognitive processing speeds in older adults, a straightforward solution (once again easier to implement in TDI) is to simply allow older learners more time to complete the training content (Truxillo et al. 2015).

Thus, the simple answer is to combine elements of age-specific and age-general training in the design of training programs, which includes older learners. However, scholars who advocate age-specific training may argue that extending training time or increasing font size may not be sufficient to effectively train senior employees. While there is an empirical case to be made for the effectiveness of age-specific training, it is important to note that much of this research evidence is drawn from non-work populations, for example, Hickman et al. (2007) recruited older participants from a community center, and van Gerven et al. (2006) recruited older participants using newspaper advertisements.

In workplace training, implementing *substantively different* training programs for *different groups* of workers has several important implications. Significantly, it may be illegal. Most countries have laws that prevent differential treatment in the workplace on the basis of demographic factors including age (e.g., the UK's Equality Act and the US Age Discrimination Act). Even if the purpose of the action is to support the learning of the “disadvantaged” learner, if differential assignment results in different levels of learning, and different job or promotion opportunities later, it can (and will) be legally challenged.

Additionally, assignment of older workers to special training runs the risk of stigmatization and stereotype effects during and after training. When older workers are assigned to their own training program (which is perceived as less demanding), this could reinforce existing negative stereotypes of them

(Ng and Feldman 2012; Posthuma et al. 2012), and further stigmatize them. This increased stigma is predicted to directly affect the older worker, during and after training by mechanisms such as discrimination, expectancy confirmation, automatic stereotype activation, and threats to their personal or social identity (Major and O'Brien 2005). These actions in turn threaten to decrease older workers' self-efficacy (Maurer et al. 2008; Williams van Rooij 2012), elicit stereotype threats (Cavanagh 2011; Nelson 2005), and diminish their desire to participate in training (Porcellato et al. 2010). Further, stigma threats are likely to carry into the training environment. While Shapiro et al. (2007) studied stigmas associated with weight and not age, their findings are illuminating. In a well-controlled study, the researchers found that trainee obesity influenced trainer expectations *and* evaluations of the training and trainee. More importantly, negative expectations held by trainers were, in turn, related to trainee evaluations of the training and to decrements in training performance. If replicated among older learners, the results suggest that when older workers are differentially assigned to training programs designed for "less capable" learners, the impact could be to lesser learning during training, and more negative consequences post-training.

The reader may have noted that the prescription to assign older employees to different training because of reduced cognitive capabilities is essentially a call for an aptitude-treatment interaction (ATI) intervention. The ATI effect refers to the notion that some instructional treatments will differ in effectiveness for particular individuals depending upon levels of specific abilities or individual characteristics (Snow 1989). Further, optimal learning should occur when instruction is exactly matched to the aptitudes of the learner.

ATI effects have been documented and remain a popular post hoc explanation for moderating effects in instructional programs. This has occurred despite the insistence of Cronbach and Snow (1977) that many ATIs are complex and difficult to demonstrate reliably, and that *no particular ATI effect is sufficiently understood to stand as the basis for instructional practice*. Research in relation to ATI effects in education has produced mixed results. Even Cronbach (1975) admitted, "Snow and I have been thwarted by the inconsistent findings coming from roughly similar inquiries. Successive studies employing the same treatment variable find different outcome-on-aptitude slopes" (p. 119). One recent meta-analysis of ATIs examined the interactive effect of trainee general cognitive ability and the treatment of training (Kowollik 2009). The meta-analysis found that small ATIs exist, but they varied depending on the criterion and were not robust at all for skill outcomes. Kowollik concluded that the size and variability of the ATIs suggested that it is not advantageous to tailor training based on trainee general cognitive ability.

In summary, there is a debate among intelligent and well-meaning scholars about the need for, and desirability of, age-specific (vs. age-general) training for older adults. While there is empirical support for both arguments, in general any ATI effect tends to be easier to label post hoc than it is to support *a priori* hypothesized effects (see also, Caspi and Bell 2004). Further, as I discussed at the outset, there is wide variability in cognitive abilities with age cohorts, so the wisdom of assigning one worker to an “older worker/lower cognitive capability” treatment and another to “younger worker/higher cognitive ability” on the function of chronological age seems dubious. Additionally, the negative social (workplace), legal, and training consequences associated with such assignments heightens the risk.

Accordingly, in terms of recommended human resource development practice, the best course of action would seem to be as follows. Training programs should be designed to be highly effective, following sound, empirically supported instructional principles. The same training programs—content and delivery—should generally be offered to all employees, regardless of age. As evidence suggests that effective coordination (administration) of training is also related to trainee learning (Noe and Colquitt 2002), care should be taken to attend to room factors, training schedules, length of training, training stimuli, and so on, in a way that supports the needs of older trainees but does not result in a demonstrably different training experience.

With all that said, there is emerging literature that some training practices or tactics are effective with older learners. These are reviewed in the subsequent section. So that I don’t sound like I am saying “Don’t create age-specific training but use these age-specific tactics,” the argument here is that, to the extent that an organization believes that a larger number of adult workers will participate in training, the better served they are to incorporate training practices that are not only generally effective but also have been demonstrated to enhance learning in senior employees.

Designing Training for Older Workers

Pre-training In general, how training is framed or presented is important to all learners (e.g., Hicks and Klimoski 1987). If training is remedial, training performance is more effective if trainees perceive they were selected fairly (Quiñones 1995). This advice applies to assigning older workers to training as well. However, it is also important that the training is framed as an intrinsic benefit (Beier et al. 2012; Kooij et al. 2011; Truxillo et al. 2015). Stamov-Roßnagel and Hertel (2010) noted that worker interest in acquiring

new skills and knowledge or furthering one's career decreases with age. Thus, training assignments should appeal to motives such as greater autonomy and self-determination, as well as positive relationships with co-workers and supervisors. Other scholars have suggested clarifying the personal relevance of the training, that is, how it is related to prior knowledge and experience (Beier and Ackerman 2005), or how the training will be helpful to either work or personal demands (Bean 2003; Cennamo and Dawley 1995), as well as to contributing to helping others or society (Kooij et al. 2011). Note that explaining the relevance of training could be done at the point of training assignments, pre-work, or at the beginning of training.

Pre-training activities involve not only the training assignment but also the scheduling and setup of the training delivery, as well as preparation of the learning. Bean (2003) recommended that, for face-to-face training, earlier in the day tends to be a more optimal time, physically and mentally for older learners. Mayhorn et al. (2004) recommended breaking longer training sessions into multiple shorter ones to avoid information overload. Ideally, training content should be organized into well-defined units in which each successive lesson builds on prior ones, and builds incomplexity and fidelity to job tasks (Jay and Willis 1992; Mayhorn et al. 2004).

Because of changes in vision, hearing, and physical stamina that occur with age, it is likely that some accommodations to the physical training space will be necessary (Moseley and Dessinger 2007). Beier et al. (2012) recommended providing comfortable furniture and proper lighting. Additionally, it is helpful to ensure the training audio is loud enough, and extraneous outside distractions are limited (Charness et al. 2001; Ford and Orel 2005). Note that these recommendations are all for face-to-face or OTJ training. When training is delivered by the computer, the same recommendations hold true, but it becomes easier to customize audio, font size, and so forth to each individual learner.

To prepare older learners for training, it may be helpful to remind them of the purpose and relevance of the content before the start of training. Given that older workers may be more likely to forget previously learned information, it can be helpful to send pre-work that includes summaries of prior training programs or job-relevant content. Older learners may benefit from pre-training on cognitive strategies to enhance their training performance (Belbin and Downs 1964). Thus, older adults could be given the option of training on self-regulation or mnemonic strategies (e.g., imagery) prior to the start of more formal job-related training (Dunlosky et al. 2003). They are likely aware that learning during training may be more difficult for them than younger learners, so the availability of optional pre-training interventions

that close the learning gap may be attractive. Interestingly, another study by Dunlosky and Hertzog (2001) showed that simply encouraging older adults to use cognitive strategies during training increases the use of such strategies and improves learning.

When training involves either TDI or blended learning (a combination of face-to-face and TDI), other preparations may be helpful. At least for the near future, it may be expected that many older adults have lower levels of experience and comfort with computer-based technology (Charness and Boot 2009). Williams van Rooij (2012) recommended that older trainees have the opportunity to practice with training software prior to instruction. Marquié et al. (2002) go further. The researchers noted that self-efficacy is positively correlated and computer anxiety negatively correlated with computer knowledge. Thus, they recommended that when the training involves high computer interaction, older trainees should be pre-trained on how to use and interact with the computer. Because such training may have benefits for them outside of work as well, senior adults with the opportunity to receive such training may see it as a perk rather than a remedial assignment.

Training Delivery Older adults are often stereotyped as forgetful and slow at learning new information (Lineweaver et al. 2009). Multiple studies confirm that when presented with stereotype threat, the training performance of older adults is negatively affected (Cavanagh 2011; Hess et al. 2003; Nelson 2005). Thus, the first recommendation is that trainers and training programs avoid making participant age salient, coupled with evidence of (or predictions of) negative learning and memory performance as a function of age.

As argued above, an age-general training perspective suggests that following sound instructional principles should improve learning outcomes for trainees of all ages. Also as noted above, resources such as Clark (2014), Dunlosky et al. (2013), and Salas et al. (2012) provide thorough reviews of the instructional and training literature with respect to learning principles. More recently, Kraiger and Mattingly (*in press*) summarized these training principles in terms of three broad strategies: making learning engaging, making learning meaningful, and making training effortful. Learner engagement is important because greater effort on the part of the learner promotes self-regulation (Schunk and Zimmerman 2012), deeper processing of training content, and facilitates later recall and application (Craik and Lockhart 1972). Some strategies for building engagement include allowing time for learner reflection (Clark 2014) and empirically supported tactics such as practice quizzes, tests, and clickers (Dunlosky et al. 2013).

Making training meaningful was addressed above during the discussion of pre-training framing of training assignments. During training, the more relevant content is to prior experience, the more the learner should be able to relate new knowledge to existing knowledge (Sterns and Doverspike 1989), thereby reducing cognitive load (Chandler and Sweller 1991). Reduced cognitive load—the total pressure on a learner given available cognitive resources—should be particularly advantageous for adult learners. Within training, some simple ways to increase meaning are to use examples relevant to the job (Clark 2014), limit the use of extraneous material (e.g., cartoons and videos) that are not directly related to training content (Mayer 2008), but personalize content by use of first- and second-person voice and collaborative learning platforms (Rebok et al. 2007; Xie and Bugg 2009).

The notion of making instruction effortful reflects the notion that training should be neither too easy nor too hard (Bjork 2013). Effort on the part of the learner again promotes deeper learning and greater retention. An effective way to increase learner effort is through carefully designed practice (Van Fleet and Antell 2002). Practice should replicate how the training will be used on the job (Baldwin and Ford 1988), but vary work conditions or assignments to promote active processing (Williams van Rooij 2012). Practice variability has been consistently found to slow initial skill acquisition, but promote effective transfer to novel tasks (Schmidt and Bjork 1992). Additionally, knowledge and skill training should be spread over multiple sessions, as segmenting of training content has been found to be one of the most “dependable and replicable phenomena in experimental psychology” (Dempster 1988: 67).

In addition to these age-general training principles, there are two specific training methods that bear special mention. Again, these are tactics that are effective in general, but have been demonstrated to be particularly effective in the training of senior employees. The first is the use of video modeling (Callahan et al. 2003; Struve and Wandke 2009; Xie and Bugg 2009). The use of behavioral modeling is generally one of the most effective training methods (Taylor et al. 2005). Behavioral modeling helps learners acquire procedural knowledge by observing another person (the model) execute task-related behaviors (Bandura 1986). Struve and Wandke suggested that the use of video models should help older learners mimic correct behaviors and build task-related mental models. Further, watching a model perform a required task clarifies task-specific performance requirements and the associated outcomes (Callahan et al. 2003). This may enhance perceptions of training relevance. Moreover, modeling is hypothesized to positively affect learners’ self-efficacy beliefs and increase motivation to learn (Callahan et al. 2003; Struve and Wandke 2009). In a meta-analysis of instructional methods with older

learners, Callahan et al. found a positive effect for video modeling compared to lecture-based instruction.

Finally, multiple authors have recommended increasing total training time and/or allowing self-pacing during training (Beier et al. 2012; Belbin and Belbin 1972; Callahan et al. 2003; Truxillo et al. 2015; Xie and Bugg 2009). As it is well established that cognitive processing speed slows with age, it is natural that the time required to process training content increases (Sterns and Doverspike 1989). However, given ample time, older adults can master training material as well as, or nearly as well as, younger workers (Meyer 1987). Increasing the time for training is one strategy to accommodate slower processing by older learners. However, Callahan et al. (2003) argued that self-pacing not only allows for individual differences in learning rate but also allows older learners to internalize the importance of training (Knowles et al. 2014) and to master the content. In their meta-analysis of training methods for older learners, Callahan et al. found a significant effect for self-pacing, accounting for 15 per cent of the variance in study outcomes.

Self-pacing in classroom training with mixed-aged learners creates obvious problems. Hence, two training strategies for incorporating self-paced learning are TDI and OTJ learning. TDI enables training presentations to be customized in ways that are more difficult than in classroom-style training. Additionally, training stimuli can be easily modified, for example, with the use of larger fonts or individualized volume (Charness and Boot 2009; Moseley and Dessinger 2007). As noted above, while the use of TDI can create other challenges for older users with less experience, pre-training to acclimate senior trainees to software and hardware challenges can mitigate many of the disadvantages. In a recent meta-analysis, computer training interventions have been shown to have significant effects on non-job-related cognitive and memory performance (Kueidder et al. 2012), so the use of individualized TDI for training job-related skills is a promising avenue for future research and implementation.

Finally, self-paced learning can also be easily implemented into OTJ training (Tannenbaum et al. 2010). Besides the ability to modify training so that it is at a learner-desired pace, there are other attributes of OTJ that make it well suited to train older workers (Beier et al. 2012). First, it is more likely to be delivered just-in-time, meaning that workers are trained when they need to be, and the relevance of training is readily apparent. Additionally, newly acquired skills can be immediately applied, so there is less likelihood of forgetting newly learned skills. Additionally, because of the presence of an OTJ trainer, there is an immediate social presence that can be positive and not as readily available in TDI or even classroom training (Johnson et al. 2008).

Additionally, a skilled trainer can tailor the training to the experience and existing knowledge of the worker, increasing relevance for and decreasing cognitive load on the learner.

Future Research

By extrapolating from the extant research on cognitive and emotional changes in older adults, it is possible either to create age-specific training interventions or to design more robust age-general interventions, which would benefit older workers. However, validation of such interventions is limited. Accordingly, there is a need for testing promising training interventions with functional adults in their 50s and 60s. While our primary interest would be in main effects for training methods, it would also be useful to collect, as much as possible, individual difference variables on factors such as fluid and crystal intelligence, WM, and learner motivation so that we can better understand the boundary conditions of when such methods work.

Additionally, and as in other areas covered in this handbook, it is also important to disentangle the role of perceptions and self-perceptions from the impact of training methods. For example, in classroom training, do stereotypes of trainers or meta-stereotypes of learners undermine the effectiveness of lectures? Do modern adult learners still have the same low levels of computer self-efficacy as was presumed 20 years ago? How does the social dynamics of mixed-age groups help or hurt collaborative learning?

Summary

Changing demographics and the higher number of adults working past traditional retirement ages has created an increased awareness of the importance of developing viable means to train older workers. Empirically based changes in cognitive skills and motivational tendencies in older adults necessitates the need to carefully consider established means of developing and delivery workplace training programs. However, variability within age cohorts as well as the practical realities of the challenges of offering different training programs calls into question the wisdom of providing different forms of training programs for old versus young adults. While recognizing the case for age-specific training methods, I argue for the design and delivery of age-general training programs. These incorporate best practices in instructional design (training principles that maximize learning regardless of training age), coupled with

several specific training practices, which, while generally effective, should be particularly effective for older learners.

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27

'When You Grew Up ...' or 'How Old Are You?' A Review of Theory and Evidence on Generational and Age Differences in Psychological Contracts

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In many developed countries, organisations are facing challenges regarding the potential workforce. Some figures suggest that, as a result of lower fertility rates and increased life expectancy combined with low participation rates for older workers, the dependency ratio (i.e., the ratio of populations aged 65 and older to populations aged 20–64) is on the rise (OECD 2006). This will lead to an expected 10 percent reduction in the potential workforce between 2020 and 2050 (OECD 2005).

In response to an increased need on the part of HR practitioners and managers to know how to best deal with current and future demographic changes in our workforce, the study of demographics in the workplace continues to grow at a strong pace (Baltes and Finkelstein 2011). In this respect, two areas of attention in contemporary research on age diversity have particularly

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blossomed: the literature on generational differences and the literature on aging workers. These two streams have developed separately from each other, with separate theoretical frameworks and different conceptualisations with regard to the ways in which age diversity impacts work-related variables.

An underlying problem that these streams of research share is the difficulty to empirically establish the true source of age-related differences. This problem has been well described in the sociological literature as the age-cohort-period confound (Parry and Urwin 2011; Rhodes 1983). Essentially, it means that age (or birth year) is a proxy for either chronological age, generational cohort differences or a reflection of societal change in specific periods that impacts anyone.

The only way to truly single out these individual effects would be to study multiple generational cohorts along the course of their lives, a study design that would require 60–100 years of data collection (Schaie 1965, 1986). This would be a feat yet to be achieved in the management literature. Instead, the course that researchers in different streams have followed is to increasingly abandon age as a proxy variable and to develop new, theory-based variables that reflect age or time-related developments in a person. For example, in the literature on aging workers, age has been diversified into different conceptualisations such as psychosocial age, chronological age, organisational age or biological age (Kooij et al. 2008), while the literature on generational cohorts is moving towards an event-based framework in which formative periods and formative events are studied as a way to understand how and why generational cohorts may differ (Groen et al. 2015; Lub et al. 2014; Schuman and Scott 1989).

In this chapter, we focus on the psychological contract (PC) as a key construct to understand how age diversity influences employment relationships. The PC describes an individual's beliefs regarding reciprocal obligations between him- or herself and the organisation (Rousseau 1995). In the past three decades, the PC has become one of the most influential constructs in the management literature, thanks to its ability to explain social exchange relationships and predict employees' attitudes and behaviours (Conway and Briner 2009). In essence, the development of the PC concept inherently reflects change over time in societies and individuals (Anderson and Schalk 1998).

This chapter reviews theoretical developments and empirical evidence in different streams of age-diversity research in relation to the PC. It also formulates future directions for research. In doing so, this chapter contributes to the literature in several ways. First, it combines and compares insights from the aging worker perspective and the generational cohort perspective with regard to the PC, allowing a discussion contemplating where these streams diverge in their perspectives on age-related effects. Second, in reviewing the evidence

from these different streams, this chapter offers combined insights for the benefit of HR practitioners with regard to the evidence on age diversity effects previously presented separately. Finally, this chapter proposes new research avenues that could enhance our understanding of the effects of age diversity.

Psychological Contract

As mentioned earlier, the PC refers to an employee's beliefs regarding mutual obligations, promises and expectations between the employee and the organisation (Rousseau 1995). PC theory is based on theories of social exchange (Blau 1964) and equity (Adams 1965). According to Blau (1964), employees strive for a balance in exchanges between them and the organisation. The expected reciprocity in the exchange relationship causes employees to attempt to restore any perceived imbalance, be it high or low. In other words, if an employee perceives the organisation to have *fulfilled* obligations, he/she will reciprocate in kind through positive work behaviours (Rousseau 1995). Conversely, if an employee perceives the organisation to have *failed* in fulfilling obligations, this may be evaluated as a breach of the PC, and the employee will reciprocate by lowering his/her contributions (Morisson and Robinson 1997).

Moreover, as the PC concerns *perceived* obligations, individuals are considered active constructors of reality (Robinson 1996). How the PC is conceived is therefore not simply a response to inducements offered by the other party, but based on perceptions of mutual obligations. These perceptions are typically affected by 'pre-existing schemas shaped by multi-level factors' (Rousseau 2001: 525). Schemas are defined as cognitive structures that represent organised knowledge about a situation or a person, and they affect the perception of incoming information, the retrieval of stored information and inferences based on that information (Fiske and Taylor 1984). In relation to work settings, Rousseau (2001) suggests that schemas typically consist of elements widely shared by individuals in a society combined with idiosyncratic elements that are connected to individual experiences in work settings.

These schemas generally develop from pre-employment factors (e.g., motives and values), societal influences (e.g., social contracts and norms) as well as on-the-job experiences (e.g., socialisation practices), and they affect the creation of meaning around promises and commitments that employees and employers make to each other, perceptions of the extent of their obligations, and finally the degree of reciprocity and mutuality that the parties to the contract demonstrate (Dabos and Rousseau 2004).

Age Diversity

In recent years, there has been an increasing interest in the topic of age diversity in the workforce, particularly in relation to the PC (see Bal et al. 2008, for a meta-analysis), most likely in response to the same changing demographics as described above. Over the past two decades, age-diversity researchers have come to realise that chronological age may not reflect the complexity of age effects in the work setting (Sterns and Miklos 1995). Instead, chronological age may be a proxy for age-related variables that can affect work-related outcomes (Kanfer and Ackerman 2004). There is a general belief that people gradually change over the course of their lives, and that changes include biological age (in relation to physical and mental functioning), organisational age (related to seniority and job experience) and lifespan (related to behavioural changes in response to unique life events), all of which affect individuals at personal, organisational and societal levels (Kooij et al. 2008; Sterns and Doverspike 1989).

Two key theories are often used to argue how the process of aging affects employees' PCs: the Socio-emotional Selectivity Theory (SST: Carstensen and Löckenhoff 2004) and the Selection Optimization with Compensation Theory (SOC: Freund and Baltes 1998; Kanfer and Ackerman 2004). Essentially, these theories argue that people assess their personal resources and focus on aspects of work that best match the resources they perceive to be available to them and move focus away from aspects of work that do not. Consequently, it is argued that compared to older workers, younger workers may hold different perceptions regarding their PCs (Bal et al. 2008).

Generations

Kupperschmidt (2000: 66) defines a generation as 'an identifiable group that shares birth years, age, location and significant life events at critical developmental stages'. Although most contemporary research typically focuses only on the 'birth cohort' as the starting point for empirical study (Parry and Urwin 2011), a perhaps more defining aspect of the generational cohort approach is the role of formative events.

The notion of formative events is important because it provides a theoretical foundation that differentiates it from the age-diversity literature, which assumes a gradual change in a person over his or her lifetime due to a range of age-related factors (Kooij et al. 2008). Rather, the concept of 'formative events' suggests that in adolescence or young adulthood (age 16–25) people

experience particularly salient societal events and consequently form a shared memory of those events which will generate relatively stable mental schemas about aspects of their lives that affects future values, attitudes and behaviours (Parry and Urwin 2011). Krosnick and Alwin (1989) suggest that these values and core attitudes crystallise in this early socialisation phase and that events in this phase have the most profound impact on individuals as they become fixed and resistant to change (Alwin and Krosnick 1991; Krosnick and Alwin 1989). Although the role of these mental schema and the recognition of societal experiences and early work experiences as well as their impact on perceived obligations are well recognised in the PC literature (De Vos et al. 2003; Rousseau 2001, 2003), the cohort perspective remains understudied in PC research.

Age–Period–Cohort Confound

Understanding longitudinal changes in an individual are complex and difficult to measure. This is reflected in the debate around the age–period–cohort confound which has been extensively discussed in the life stage and aging literature over the past 40 years, but which has not yet been resolved effectively (Parry and Urwin 2011; Schaie 1986). Changes in most psychological variables may reflect societal changes that are unique to different cohorts or maturational processes and that are relatively invariant across time or population (Twenge and Campbell 2008). For example, 60-year-olds may be less optimistic than 40-year-olds as a consequence of the effect of aging, because they belong to different birth cohorts, because they were surveyed at a different time in history, or because of a combination of these factors (Sutin et al. 2013). Any cohort may have had specific experiences such as differences in educational opportunities, availability of medical care or nutrition or differences in economic prosperity that have shaped the way in which individuals from that cohort evaluate aspects of their lives, experiences that do not colour evaluations of other cohorts' members in the same way (Sutin et al. 2013). It is impossible to disentangle age effects from cohort effects using cross-sectional data because the two are confounded: a 60-year-old belongs to the same age group and the same birth cohort (Sutin et al. 2013).

Moreover, contemporary management research generally aims to predict behaviours and attitudes based on generations that are *currently* in the work-force (which limits the measurability of the construct). This research approach sets it apart from those that are often used in sociological and philosophical areas of research. These disciplines tend to be reflective and retrospective in

their approaches, and therefore enable the identification of important societal events and groups that signify the identity of a specific generation (Spitzer 1973).

As mentioned above, the goal of this chapter is to review the theoretical and empirical evidence concerning the question of how age diversity impacts employees' PCs. In order to examine these effects, it is important to consider similarities and differences between studies that have adopted different age perspectives. Hence, we aim to answer the following questions:

1. What are the similarities in findings from studies adopting different age perspectives regarding the role of age diversity in employees' PCs?
2. What are the differences in findings from studies adopting different age perspectives regarding the role of age diversity in employees' PCs?

In addition to the main research questions, it is important to evaluate the quality of the empirical evidence. Since the age-period-cohort confound plays a major role in age-diversity research, an additional aim of this study was to examine whether scholars have accounted for the age-period-cohort confound in their study designs.

Method

Data Collection

We conducted a literature search to identify studies that examined the role of age-related factors in the PC framework. We adopted several search strategies. First, we conducted electronic searches through the following databases: Business Source Complete, PsycInfo and the Psychological and Behavioral Sciences Collection. Search terms included 'psychological contracts', 'psychological contract breach' and 'psychological contract fulfillment' coupled with various age-related factors including 'age', 'generations', 'tenure', 'career stage', 'life stage', 'aging', 'skill obsolescence', 'psychosocial age', 'biological age', 'societal age', 'cohorts' and 'expertise'. Following Bal et al. (2008) and Vantilborgh et al. (2015), we searched for articles that had been published after 1989 (the year in which Rousseau re-conceptualised PC theory; Rousseau 1989). Second, we conducted a complementary search in Google Scholar using the same keywords. Third, to ensure that our literature search was exhaustive, we thoroughly examined the reference lists of several literature reviews and meta-analyses (e.g., Bal et al. 2008; Vantilborgh et al. 2015). Throughout the

search process, we screened the titles and abstracts of the articles to ensure that their content focused on PCs and one or more age-related factors. This pre-screening of the articles led to the identification of a pool of 29 potential articles. In order to determine whether the pre-screened articles were eligible for inclusion, we evaluated them on the basis of three exclusion criteria. We shall discuss the process of applying these exclusion criteria in the following paragraphs.

In order to be included in our review, articles had to focus on different groups of employees from one or more age perspectives. For example, a study taking a generational perspective on PCs should not merely focus on one generation of employees, but should include employees from different generations. As a result of this first criterion, six articles were excluded (e.g., King and Bu 2005; Payne et al. 2015; Van der Smissen et al. 2013). We made one exception to this exclusion criterion: we retained an article written by De Hauw and De Vos (2010). Although their study on PC content expectations exclusively concerned Millennials, they did include *two* groups of Millennials (one prior to and one following the recent economic recession). Since the authors were able to compare different *groups* of Millennials, this study was retained.

According to Conway and Briner (2005), the majority of PC research is concerned with the contents of the PC or the effects of PC breach (PCB). Consequently, in order to compare studies, the second exclusion criterion concerned the PC issue that was examined. Studies addressing age-related factors in relation to issues other than PC contents or breach were excluded from our review. Two studies (Ng and Feldman 2009; Vantilborgh et al. 2013) were eliminated as a result of this exclusion criterion. More specifically, Vantilborgh et al. (2013) focused on age-related differences in response to PC imbalance, whereas Ng and Feldman (2009) focused on contract malleability and replicability. Since there is barely any research that has considered these particular PC issues, let alone from an age perspective, it would be very difficult to compare the results to other studies. For this reason, we excluded these two studies from our review.

The final criterion concerned the quality of the articles included in our study. In order for journal articles to be included in our review, they had to be listed in the Association of Business Schools (ABS) Academic Journal Quality Guide 2015, or indexed in the Thomson Reuters Journal Citation Reports with an impact factor. Book chapters from edited books were included in our study when the Thomson Reuters Book Citation Index recognised the publisher. In addition to journal articles and book chapters, we were also open to including dissertations. However, the two dissertations that were identified as potentially relevant for our study did not meet our first inclusion criterion. Habrok (2004) focused only on older workers, whereas Ormsbee (2011)

focused exclusively on Generation X middle managers. Consequently, it was not necessary to formulate specific exclusion criteria for dissertations. As a result of the third criterion, three studies were excluded (i.e., Agarwal and Bhargava 2013; De Meuse et al. 2001; Krivokapic-Skoko et al. 2009). These studies were excluded because they had not been published in journals that were recognised in the ABS journal list or because their impact factor had not been determined according to Thomson Reuters Journal Citation Reports. The final sample consisted of 18 articles (13 primary studies, 2 meta-analyses and 3 conceptual papers). The following section describes the coding process for the different types of studies.

Coding of Studies

Our review included different types of articles: primary research studies, meta-analyses and conceptual papers. For each article type, we developed a specific coding scheme. We will discuss each of these in the following paragraphs.

We manually coded the primary studies identified in the literature search using the following themes: (1) author name(s) and publication year, (2) sample size and study design (cross-sectional or longitudinal), (3) country/countries in which the study was conducted, (4) age perspective, (5) operationalisation of age-related variable(s), (6) form of PC assessment, (7) measurement of PC, and (8) main results of the study. Although some of these codes are relatively straightforward (e.g., author name(s), publication year, sample size, and study design), others required careful assessment. To determine which age perspective was employed in the various studies, we mainly relied on the typology formulated by Kooij et al. (2008). According to these researchers, five age perspectives can be distinguished, namely chronological age, functional age, psychosocial age, organisational age and lifespan age. In addition to these five perspectives, we included an additional alternative perspective, namely the generational perspective. After identifying the age perspective(s) that had been used in each of the studies, we assessed how these perspectives were conceptualised and measured. For example, Bal et al. (2013c) adopted a psychosocial and organisational age perspective. The former was conceptualised and assessed through future time perspective (FTP), whereas the latter was defined and measured as perceived work-related expertise.

In addition to the conceptualisation and assessment of age perspectives, we focused on the form of PC assessment and the measurement of PC. To determine the form of PC assessment, we relied on the classification approach suggested by Rousseau and Tijoriwala (1998). According to these authors, PCs can be assessed on the basis of their contents. The contents can

be conceptualised in terms of specific elements, composite indices or nominal classification (e.g., relational vs. transactional). The second assessment form identified by Rousseau and Tijoriwala (1998) is the feature-oriented form. This approach assesses PCs in terms of their features (e.g., explicit or unwritten). The third form is referred to as evaluation-oriented and refers to the degree of fulfilment or breach. Since most PC research focuses on the contents of the contract or the evaluation of the contract (Conway and Briner 2005), our assessment remained limited to these two assessment forms. Table 27.1 presents the assessment of each of the primary studies according to the above-mentioned themes.

In order to code the meta-analyses, we used a number of similar coding themes; however, due to the nature of meta-analytic studies, it was also important to use certain unique themes. Similar themes included author and publication year, conceptualisation of age perspective, assessment of PC, and main findings. In addition, we assessed the search strategy used, the inclusion/exclusion criteria used and the number of studies that were included in the meta-analysis. The assessment of the meta-analytic studies is depicted in Table 27.2.

We used a number of similar themes to code the conceptual papers, but since conceptual papers are inherently different from empirical papers, it was important to use certain unique codes as well. Similar to the meta-analytic and primary studies, we used the following themes: authors and year of publication, age perspective and conceptualisation of age, and PC assessment. In addition to these overlapping themes, we assessed the theoretical mechanisms used as well as the papers' main ideas and propositions. Table 27.3 depicts the evaluation of the conceptual papers.

Description of Studies

The majority of the primary studies had a cross-sectional design ($N = 9$). Eight studies were conducted solely in the Netherlands, and one study was conducted in both the Netherlands and Belgium. The remaining studies were carried out in Belgium, Greece, The UK and Australia. Four studies took a generational perspective to PCs. One study included both a generational and organisational age perspective (Hess and Jepsen 2009). One study took a lifespan age approach, two studies took a chronological age approach, two studies took an organisational age perspective and one study took a psychosocial approach. The remaining two studies employed more than one approach. One study took both a chronological and organisational age perspective; the other study combined the psychosocial approach with the organisational age perspective. Regarding the assessment of the PC, seven studies solely focused

Table 27.1 Overview papers

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC Results
1	Bal et al. (2013a)	<i>N</i> = 240, longitudinal (two-wave)	The Netherlands	Organisational age	Organisational age assessed by: organisational tenure (short tenure = less than 5 years, long tenure = 6 years or more)	Evaluation-oriented	Composite of terms: PC fulfilment is significantly positively related to work engagement and significantly negatively related to turnover intention for low-tenure employees but not for high-tenure employees
2	Bal et al. (2013b)	<i>N</i> = 240, longitudinal (two-wave)	The Netherlands (Dutch division of multinational)	Chronological age, organisational age (supplementary focus)	Chronological age was measured as a continuous variable (calendar age), young workers = 32.9 years, older workers = 51.4 years. Organisational tenure was measured by a continuous variable (number of years working for organisation)	Evaluation-oriented (breach of economic, socio-emotional, and developmental obligations)	Composite measure of multiple dimensions of PC. 5 items were used for economic breach, 4 for socio-emotional, and 3 for developmental breach. A latent variable consisting of the three dimensions was constructed to measure PCB.

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC Results
3	Bal et al. (2013c)	N = 334, cross-sectional	Belgium and The Netherlands	Psychosocial age, organisational age	Psychosocial age was measured by FTP, organisational age was measured by perceived work-related expertise	Evaluation-oriented	Composite of terms: <i>Psychosocial age</i> : fulfilment of socio-emotional obligations is positively related to continuance commitment for employees with short FTP but not for those with long FTP. Fulfilment of socio-emotional obligations is positively related to normative commitment for employees with long FTP but not for those with short FTP. Economic fulfilment is positively related to continuance commitment for employees with long FTP, but not for those with short FTP. Economic fulfilment is positively related to normative commitment for employees with short FTP but not for those with long FTP.

(continued)

Table 27.1 (continued)

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC Results
4	Bal and Kooij (2011)	<i>N</i> = 465, cross-sectional	The Netherlands	Chronological age	Content-oriented 7 items were used to measure relational and transactional contracts (calendar age).	<i>Relation between age and PC:</i> there is a negative relationship between age and transactional PC. There is a negative relationship between age and relational PC.	
5	Bal and Smit (2012)	<i>N</i> = 163, cross-sectional	The Netherlands	Chronological age	Evaluation-oriented	<i>Moderating role of age:</i> the relationship between work centrality and transactional PCB was not significant for younger workers, whereas there was a significant negative relationship between work centrality and transactional PC for older workers. <i>The relationship between work centrality and relational PC was not significant for younger workers. There was a significant positive relationship between work centrality and relational PC for older workers.</i> <i>In the context of PCB, younger workers with high suppression are able to maintain positive affect, while older workers with high suppression experience a stronger decrease in positive affect as a result of PCB</i>	

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC	Results
6	Bellou (2009)	N = 1145, cross-sectional	Greece	Lifespan age	Lifespan age assessed by age groups: 18–34 years, 35–54 years, and older than 55 years (these age groups are distinguished according to the time period in which employees entered the workforce)	Content-oriented Terms: 41 organisational obligations	18–34 years: find flexible work schedule obligations more important than the older employee groups. 35–54 years: find constant information on the company, and supervisory and co-worker support for personal problems more important than the other age groups, regard fair supervision, autonomy to do their job, open and honest communication with colleagues, continuous training, job security, opportunities for personal development, and supervisory and co-worker support for work problems more important than younger employees, and find participation in decision-making that involves the company more important than older employees (> 55 years)	There was barely any support for the moderating role of tenure in the reciprocal relationship between Psychological Contract Fulfillment (PCF) and performance (only 1 of the 6 moderation analyses was significant)
7	Conway and Coyle- Shapiro (2012)	N = 146, Longitudinal (four waves)	The UK	Organisational age	Organisational tenure, variable was measured in years and months. Tenure was log transformed.	Evaluation-oriented (PC fulfilment)	Composite measure consisting of 12 items.	(continued)

Table 27.1 (continued)

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC	Results
8	De Hauw and De Vos (2010)	N = 1612, cross-sectional (787 millennials graduated in period of economic growth, 825 millennials graduated in period of economic recession)	Belgium	Generational perspective	Millennials	Content-oriented (expectations about PC content, i.e., anticipatory PC)	Composite of terms: 7 PC scales: career development, job content, social atmosphere, financial rewards, work-life balance, training, and job security	Context effect: millennials that graduated in 2009 had lower expectations regarding PC obligations related to work-life balance and social atmosphere than millennials that graduated in 2006, suggesting that economic recession affects expectations regarding these two dimensions of the PC.
9	De Lange et al. (2011)	N = 90, longitudinal	The Netherlands	Psychosocial age	Psychosocial age assessed by: FTP, promotion focus	Evaluation-oriented	Nominal classification: transactional and relational obligations	Generational effect: both groups of millennials (graduation in 2006, graduation in 2009) had similar (high) expectations of PC obligations related to job content, training, career development and financial rewards regardless of economic context (prosperity vs. recession). FTP: relational PCB negatively affects work motivation for employees with a high FTP; for employees with low FTP this relationship is not significant. <i>Promotion focus:</i> promotion focus does not moderate the relationship between PCB (relational and transactional) and work motivation

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC Results
10	Hess and Jepsen (2009)	N = 284 for analyses among generational cohorts, N = 265 for analyses with career stage, cross-sectional	Australia	Generational perspective, organisational age	Generational perspective assessed by cohorts: baby boomers, Generation X, Generation Y organisational age assessed by career stage: exploration, establishment, maintenance and disengagement stage	Content-oriented and evaluation-oriented	Content: relational and transactional obligations are higher for baby boomers than Generation X. There were no significant differences in PC content for different career stages. Evaluation: fulfilment of balanced PC is more strongly related to commitment for baby boomers than for Generation X. Lower fulfilment of transactional obligations was related to higher turnover intentions for Generation X in comparison to Generation Y. Lower fulfilment of balanced PC was related to higher turnover intentions among baby boomers and Generation Y in comparison to Generation X. X. Fulfilment of balanced obligations was related to higher job satisfaction for the exploration stage in comparison to the other three stages, and was more strongly related to commitment for the exploration stage as opposed to the maintenance phase. Lower fulfilment of relational obligations was associated with higher turnover intentions for the establishment stage as opposed to the exploration stage

(continued)

Table 27.1 (continued)

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC Results
11	Lub et al. (2015)	N = 904, cross-sectional	The Netherlands	Generational perspective	Generational perspective assessed by cohorts: baby boomers (1945–1964), Generation X (1965–1980), Generation Y (1981–1995)	Evaluation-oriented (fulfilment of five PC dimensions: job content, career development, social atmosphere, organisational policies, rewards)	Single-item measures for each PC dimension Fulfilment of the job content dimension relates more positively to affective commitment for Generation Y than for Generation X. Fulfilment of the job content dimension relates more negatively to turnover intentions for Generation Y than for Generation X and baby boomers. Fulfilment of the career development dimension relates more positively to affective commitment for Generation Y than for Generation X and baby boomers. Fulfilment of the social atmosphere dimension is more positively related to affective commitment for Generation X and baby boomers than for Generation Y. Fulfilment of the social atmosphere dimension is more negatively related to turnover intention for baby boomers than for Generation Y. Fulfilment of the organisational policies dimension is more negatively related to turnover intentions for Generation X than for baby boomers or Generation Y. Fulfilment of the rewards dimension is more negatively related to turnover intentions for Generation Y than for Generation X and baby boomers

No	Authors	Sample and design	Country	Age perspective(s)	Operationalisation	Form of PC assessment	Measurement of PC	Results
12	Lub et al. (2011)	<i>N</i> = 102, cross-sectional	The Netherlands	Generational perspective	Generational perspective assessed by cohorts: Generation X (1965–1980) and Generation Y (1980–1995)	Content-oriented (transactional and relational obligations)	Transactional obligations was measured with 4 items, relational obligations was measured with 9 items	There are no significant differences regarding the perception of transactional obligations between Generation X and Generation Y. Generation Y holds higher expectations of relational obligations than Generation X. Generation Y finds relational and transactional obligations equally important, whereas Generation X finds relational obligations more important than transactional obligations
13	Lub et al. (2012)	<i>N</i> = 358, cross-sectional	The Netherlands	Generational perspective	Generational perspective assessed by cohorts: baby boomers (1945–1964), Generation X (1965–1980), Generation Y (born after 1980)	Content-oriented 42 items (importance of content dimensions)	encompassing 8 dimensions of PC: stimulating job, work atmosphere, autonomy, salary, task description, intra-organisational mobility, work-life balance, job security	Generation Y finds the dimension work-life balance more important than Generation Y and baby boomers. Generation X finds the dimension autonomy and job security more important than Generation Y. No generational differences were found for the dimensions salary, work atmosphere and task description

Table 27.2 Overview of meta-analyses

Age perspective and conceptualisation	PC assessment	Search strategy	Inclusion/exclusion criteria	No. of studies included	Findings	
Bal et al. (2008)	Chronological age. Chronological age was conceptualised as calendar age and was measured as a continuous moderator.	Evaluation-oriented approach	Different approaches: 1. Articles published after 1989 were searched via ABI-Inform, Psycinfo and Medline with key terms including PC, PCB, PCF, commitment, trust and satisfaction. 2. Reference lists of relevant review articles and other articles were examined. 3. Searches were conducted in numerous journals (e.g., Academy of Management (AOM) Journal, Journal of Applied Psychology). 4. Authors of relevant papers presented at the Academy of Management and Society for Industrial and Organisational Psychology (SIOP) were contacted. 5. Authors were contacted to ask about unpublished papers	1. Studies had to be conducted among respondents that were employed. 2. Theoretical papers were excluded. 3. Qualitative studies were excluded. 4. Studies that were not in English or Dutch were excluded. 5. Studies that did not examine the variables of interest (e.g., trust, commitment, satisfaction) were not included	60 studies, with 62 samples	There was a stronger negative relationship between PCB and trust and PCB and affective organisational commitment for younger workers. The negative relationship between PCB and job satisfaction was stronger for older workers. Organisational tenure moderated the relationship between PCB and trust. Organisational tenure did not significantly moderate the relationship between PCB and job satisfaction or PCB and affective commitment. When age and tenure were both included in the analysis, the moderating effect of age remained significant and the same. With regard to tenure, the moderating effect was significant and positive in the relationship between breach and job satisfaction

Authors	Age perspective and conceptualisation	PC assessment	Search strategy	Inclusion/exclusion criteria	No. of studies included	Findings
Vantilborgh et al. (2015)	Chronological age and organisational age. Chronological age was conceptualised as calendar age; organisational age was conceptualised as organisational tenure	Content-oriented approach (transactional and relational PCs)	Different search strategies were used. 1. Databases including PsycInfo, ABI-Inform and Medline were searched for papers published between 1989-2013. Search terms included transactional and relational PC, age, tenure. 2. Reference lists of earlier meta-analyses were checked. 3. Authors of suitable papers that were presented at the AoM were contacted. 4. A call for (un)published papers was sent through the mailings lists of the Organizational Behavior (OB) and careers divisions of the AoM	1. Studies were only included when they reported an effect size for the age-relational PC, age-transactional PC, tenure-relational PC, or tenure-transactional PC relationship. 2. Studies were only included when they considered the employee's perspective. 3. Studies had to be conducted among paid employees. 4. Studies had to be published in English or Dutch.	26 studies were used to examine relationship between age and tenure with a transactional contract and age with relational contract. 25 studies were used to examine the relationship between tenure and relational contract.	Age and tenure were significantly negatively related to transactional PC, whereas age and tenure were not significantly related to relational PC.

Table 27.3 Overview of conceptual papers

Authors	Age perspective	Conceptualisation of age perspective	PC Assessment	Theoretical mechanisms	Main ideas	Propositions
Festig and Schafer (2014)	Generational perspective	Generational perspective assessed by cohorts: baby boomers (1946–1964), Generation X (1965–1981), Generation Y (1982–1999)	Evaluation-oriented approach	Social-exchange theory, Value orientations of different generations	Talent management practices differentially affect the PCs of different generations of talent	Highly engaged TM practices have a greater influence on PC fulfilment for Generation X and Y than for baby boomers

Authors Age perspective	Conceptualisation of age perspective	PC Assessment	Theories/ Theoretical mechanisms	Main ideas	Propositions
Low and Bordia (2011)	Organisational age conceptualised as different stages in an employee's career life-cycle. Two career stage models are used: Dalton et al. (1977): apprentice, colleague, mentor and sponsor stages; Super (1957): exploration, establishment, maintenance and disengagement stages.	Content approach; preferred employee and employer obligations	Role theory, self-concept	Employee's career stage influences preferences for employer and employee obligations; career stage is not constrained to chronological age or organisational or occupational tenure, employees are free to perceive themselves in any career stage, at any point in their work life'	<p><i>Employee obligations:</i> In apprentice stage: do routine and detailed work, 'work under guidance of other colleagues' (p. 734), in colleague stage: 'taking initiative to carry out new assignments', and challenging assignments', 'work independently to provide quality work', in mentor stage: 'helping subordinates solve work-related problems', 'providing subordinates with the opportunity to fully use their abilities', in sponsor stage: 'direct work to achieve departmental objectives', 'facilitate cooperation and unity among staff in the department'.</p> <p><i>Employer obligations:</i> in exploration stage: 'clear job description', 'coaching', 'opportunity to develop new skills', in establishment stage: 'advancement opportunities', 'effort recognition by supervisor', in maintenance stage: 'constant information on corporate issues', 'work-life balance', in disengagement stage: 'retirement benefits', 'non-stressful jobs'</p>

(continued)

Table 27.3 (continued)

Authors	Age perspective	Conceptualisation of age perspective	PC Assessment	Theories/Theoretical mechanisms		Main ideas	Propositions
				Schema theory	The employment relationship—assessed in terms of one's PC—is affected by formative experiences		
Lub et a. (2015)	Generational perspective	Generational perspective assessed by cohorts: baby boomers (1945–1964), Generation X (1965–1980), Generation Y (1981–1995)	Content and evaluation-oriented approach	The employment relationship—assessed in terms of one's PC—is affected by formative experiences	The employment relationship—assessed in terms of one's PC—is affected by formative experiences	The employment relationship—assessed in terms of one's PC—is affected by formative experiences	<i>PC Content:</i> Employer and employee PC obligations are perceived differently by different generations. <i>PC Evaluation:</i> Employees from different generations respond differently to PC fulfilment

on the role of age-related factors in the evaluation of the PC, five studies took a purely content-oriented approach and the remaining study took both a content-oriented and evaluation-oriented approach.

In relation to the two meta-analyses included in our review, one meta-analysis (Bal et al. 2008) focused on the moderating roles of chronological and organisational age in the relationship between PCB and employee outcomes. The other meta-analysis took a content-based approach and examined the relationships between chronological and organisational age and transactional and relational PCs.

Two of the three conceptual papers discussed generational differences in relation to the evaluation of employees' PCs. One of these papers additionally considered generational differences in relation to PC content. The third conceptual paper took an organisational age perspective and focused specifically on the content of the PC. Each paper took a different theoretical lens to explore age-related factors in relation to PCs.

Results

Age-Related Differences in Relation to the Contents of the Psychological Contract

Nine studies (six primary, one meta-analysis, two conceptual papers) examined age-related differences in relation to PC contents. Since scholars have taken different approaches to assessing and measuring PC contents, we further distinguished between studies that focused on age-related differences in relation to transactional and relational PCs (e.g., Bal and Kooij 2011) and those studies that considered other facet-based measures (e.g., De Hauw and De Vos 2010) or specific obligations (e.g., Low and Bordia 2011). As the conceptual paper by Lub et al. (2015) does not specify content dimensions or typologies in its propositions, it was excluded from this assessment.

Age-Related Differences and Transactional and Relational PCs

Three different age perspectives were taken in studies assessing age-related differences in relation to transactional and relational PCs, namely a chronological age perspective, a generational perspective and an organisational age perspective.

According to the generational perspective, relational and transactional obligations are higher for baby boomers than for Generation X (Hess and Jepsen 2009). Generation Y holds higher expectations of relational obligations than Generation X, whereas no significant differences exist between these two generations regarding transactional obligations (Lub et al. 2011). With respect to studies that adopted a chronological age perspective, one study found a negative relationship between age and both types of PCs (Bal and Kooij 2011). The meta-analytic study that examined chronological age in relation to transactional and relational PCs (Vantilborgh et al. 2015) found that age was negatively related to transactional contracts but not to relational contracts. There are a number of interesting differences between the studies that took a generational perspective versus those that adopted a chronological age perspective. Combined, the chronological age studies indicate that transactional obligations become less important as employees become older (negative relationship between age and transactional obligations), yet Hess and Jepsen (2009) found that baby boomers (which is the oldest generation in the workforce) find transactional obligations more important than Generation X (a younger generation).

In terms of organisational age, Vantilborgh et al. (2015) found that tenure was negatively related to transactional contracts and not significantly related to relational contracts. This result is largely similar to the results of studies examining the relationship between chronological age and transactional and relational PCs. Hess and Jepsen (2009) included a different measure of organisational age and career stages, and found that career stages were not significantly related to transactional or relational PCs.

Age-Related Differences and Specific Psychological Contract Obligations

Three different age perspectives were taken in studies assessing the relationship between age-related factors and specific PC obligations, namely a generational perspective, a lifespan perspective and an organisational age perspective.

According to the generational perspective, Generation Y (or Millennials) find PC obligations related to job content, training, career development and financial rewards very important. These obligations remain important, even during times of economic recession (De Hauw and De Vos 2010). Moreover, Lub et al. (2012) found that both Generation Y and Generation X find contract obligations related to a stimulating job and intra-organisational mobility more important than baby boomers. Additionally, Generation

X finds work–life balance more important than Generation Y and baby boomers, and places more importance on autonomy and job security than Generation Y. Following the lifespan age perspective, Bellou (2009) found that the group of 35–54-year-olds (which is somewhat comparable to the Generation X group included in the study of Lub et al. 2012; age range 32–47 at the time of the study) find a constant flow of information from the company, supervisory support and co-worker support more important than both the younger and older age groups. Moreover, this group found fair supervision, autonomy, honest communication, continuous training, job security and personal development more important than the younger group of employees, and participation in decision-making more important than the older employees. There is considerable overlap between the study that adopted a lifespan perspective and the study conducted by Lub et al. (2012). For example, both find that the middle group (Generation X in Lub and colleagues' study and 35–54-year-olds in Bellou's study) values autonomy and job security more highly than their younger counterparts.

In their conceptual paper, Low and Bordia (2011) suggest that employees in different career stages (an organisational age perspective) find different employer obligations more important. For example, employees in the exploration stage value coaching and opportunities to develop, whereas employees in the establishment stage place more importance on advancement opportunities. Those in the maintenance stage prefer work–life balance, whereas those in the disengagement stage value retirement benefits and jobs that are not stressful (Low and Bordia 2011). It is difficult to compare the propositions of this study to the findings of the other studies discussed in this section. This is because Low and Bordia (2011) consider both work and family domains in the development of their model, and indicate that career stage is independent of age and tenure, and that 'employees are free to perceive themselves in any career stage, at any point in their work life' (p. 740).

Age-Related Differences and the Evaluation of the Psychological Contract

In addition to PC content, eleven studies considered how age-related factors affect the evaluation of the PC. Of these eleven studies, eight¹ are specifically focused on the moderating role of age-related factors in the relationship

¹ Although the conceptual paper by Lub et al. (2015) also considers the moderating role of generations in the relationship between PCF and outcomes, these authors do not provide any specific propositions for the different generations. Therefore, this study is not considered in this part of the review.

between breach (or fulfilment) of PC and outcomes. This section specifically focuses on the results of these studies.

Six studies took an organisational age perspective. In four studies, organisational age was conceptualised as organisational tenure, in one of the studies organisational age was conceptualised as expertise, and in the other study organisational age was conceptualised as career stage. The results regarding the moderating role of organisational age proved to be mixed. Bal et al. (2013a) found that PC fulfilment was significantly related to both work engagement and turnover intentions for low-tenure employees but not for employees with high tenure. Moreover, Bal et al. (2008) found that tenure significantly moderated the relationship between PCB and trust. However, tenure did not moderate the relationship between PCB and affective commitment or PCB and job satisfaction when analysed separately. When analysed together with age, tenure significantly moderated the relationship between breach and job satisfaction: the relationship was stronger for employees with lower tenure.

However, Bal et al. (2013b) found that tenure did not significantly moderate the relationship between PCB and job satisfaction and PCB and performance. The latter finding was echoed in research by Conway and Coyle-Shapiro (2012), who only found support for a moderating role in the reciprocal relationship between PCB and job performance in one out of six analyses (the supported relationship suggested a moderating role in the relationship between performance and breach). The general results show that tenure does not moderate the relationship between PCB and performance, and that the results are inconsistent regarding the relationship between PCB and satisfaction. However, there is some evidence for the moderating role of tenure in relation to other outcomes, such as trust, work engagement and turnover intentions. Regarding work expertise and career stage, results provide support for the moderating role of these organisational age factors. For example, Bal et al. (2013c) found that expertise significantly moderates the relationship between socio-emotional PC fulfilment and normative commitment.

Studies that adopted a chronological age perspective found that the relationship between PCB and outcomes including negative affect (Bal and Smit 2012), trust, and affective commitment (Bal et al. 2008) was stronger for younger workers. In relation to job satisfaction, results are mixed. Bal et al. (2013b) found that the negative relationship between breach and satisfaction was stronger for younger workers, whereas results from a meta-analysis showed a stronger negative relationship between PCB and satisfaction for older workers (Bal et al. 2008).

Studies that adopted a generational perspective generally found that generations moderate the relationship between evaluation of PC and outcomes including commitment and turnover intentions. Nevertheless, the results are somewhat mixed. Hess and Jepsen (2009) found that fulfilment of balanced PCs is more strongly related to commitment for baby boomers, whereas this finding holds true only for the social atmosphere PC dimension and not the job content or career development PC dimension as distinguished in the study by Lub et al. (2015).

Studies that adopted a psychosocial perspective generally include a measure of FTP (Bal et al. 2013; De Lange et al. 2011). Overall, the results of these studies show that a long FTP moderates the relationship between the evaluation of socio-emotional and relational aspects of the PC and outcomes including work motivation and normative commitment.

Overall, the results show that age-related factors play a moderating role in the relationship between PCB and outcomes. However, it proved difficult to compare the results between different age perspectives, due to the different measures included in the studies. For example, Bal et al. (2008) found a stronger negative relationship between PCB and affective organisational commitment for younger workers. It was also difficult to compare these findings to the study by Lub et al. (2015). These scholars found that fulfilment of job content and career development dimensions relates more positively to affective commitment for Generation Y (the youngest generation currently in the workforce), whereas fulfilment of the social atmosphere dimension relates more positively to affective commitment for Generation X and baby boomers (the older generations in the workforce) than for Generation Y. Hence, although the findings presented by Bal et al. (2008) are similar to those reported by Lub et al. (2015) for job content and career dimensions, they are different for the social atmosphere dimension. Yet, since Bal et al. (2008) did not consider different PC dimensions, it was difficult to make comparisons among age perspectives.

Addressing the Age–Period–Cohort Confound

According to Rhodes (1983), generational differences can only truly be assessed through studies incorporating longitudinal, time-lagged designs. In this way, researchers are able to determine whether differences in PC obligations or responses to PCB are due to age, generational or period effects (Parry and Urwin 2011; Rhodes 1983). Hence, it is important to consider the designs of the studies that were included in the review. Nine of the 13 primary studies

included in our review had a cross-sectional study design. By adopting such a design, these studies were unable to address the age-period-cohort confound. Four studies adopted a design employing multiple waves of data collection. Although these studies employed designs more appropriate for age-diversity research, the rationale for including multiple waves of data collection was mainly related to issues other than addressing the age-period-cohort confound, or time lags were arbitrarily chosen and lags were insufficiently large to separate age, period and cohort effects. For example, De Lange et al. (2011) based their decision of a three-month time lag on the organisational context: a reorganisation within a healthcare company.

Discussion

The aim of this chapter was to determine whether studies adopting different age perspectives found similar or different results regarding the impact of age diversity on employees' PCs. In our review of the conceptual and empirical evidence, we examined age-related differences in relation to three main areas of employees' PCs: (i) transactional and relational PCs, (ii) specific PC obligations, (iii) PCB (or fulfilment).

- Summarising the main findings with regard to the first issue, the impact of age diversity on transactional and relational PCs, it can be concluded that as employees become older and have worked for the organisation for a longer period of time, transactional obligations become less important. However, based on results from a study taking a generational perspective, the oldest generation in the workforce (baby boomers) found transactional obligations more important than Generation X.
- From the main findings in relation to the second issue, age diversity and specific PC obligations, we can infer that corresponding cohorts from the generational and life span perspectives value similar types of obligations. For example, Generation X (born between 1965 and 1980) and the middle group (35–54 years olds) in Bellou's study (2009) found autonomy and job security more important than the younger cohorts.
- With regard to the third issue, age diversity as a moderator in the relationship between PCB (or fulfilment) and work-related attitudes and behaviour, it can be concluded that for younger workers the negative relationships between PCB and negative affect, trust and affective commitment are stronger. Findings are similar for organisational tenure. For example, PCB

was negatively related to engagement and positively related to turnover intentions for employees with low tenure. For both perspectives, the results are inconclusive regarding the moderating effect in the relationship between PCB and job satisfaction. Results of studies assessing psychosocial age come to a similar conclusion for some employee outcomes. That is, those with a long FTP (i.e., employees who are younger compared to those with short FTP) react more strongly to breach and fulfilment of socio-emotional and relational obligations in relation to work motivation and normative commitment. It is difficult to compare the moderating role of generations in the relationship between PC evaluation and employee outcomes to results of the other studies due to the use of different measures. Similarities were found when fulfilment of career development and job content obligations were considered; results differed with regard to fulfilment of social atmosphere obligations.

Overall, the results seem to suggest that there are both similarities and differences among studies adopting different age perspectives. Particularly studies examining the effects of chronological age and organisational tenure on PC contents often present similar results. Moreover, with regard to the moderating role of age in the relationship between breach (or fulfilment) of PC obligations and work-related outcomes, chronological age, organisational tenure and FTP frequently show comparable results; some studies have found inconsistent results, yet overall there seem to be quite a number of similarities among studies adopting these perspectives.

With regard to differences, we found that the findings of studies adopting a generational perspective were sometimes inconsistent with studies examining the effects of chronological age or organisational tenure. Additionally, although both age and generational perspectives at a measurement level depart from age/birth year, they present different, in some cases, mixed findings. This would suggest two things: first, theoretically different perspectives on age/cohort/perspective have a right to exist alongside each other for as long as we have not conclusively resolved what underlying mechanisms affect the employment relationship and what is the nature of the moderating role of age diversity on that relationship. Second, findings from the life stage and generational perspectives suggest that the middle group differs in terms of younger and older workers, which suggests that the linear relationship often presented in the chronological age perspective may hide underlying curvilinear, cubic or non-linear effects.

Moreover, none of the studies from either the age or generational perspective adopted a methodology that conclusively resolved the age-period-cohort confound problem, which makes it problematic to develop sound

recommendations for HR practitioners with regard to the policies they need to adopt beyond being sensitive to differences between older and younger workers or different generations of workers. Overall, we conclude that the age- and generational diversity literature is still in its infancy and that we still have a limited understanding of how and through which mechanisms age/ period/cohort-related variables impact important work-related aspects—and in particular, the employment relationship. Future research should focus on different research designs that allow for more evidence for different age perspectives (i.e., qualitative designs or drawing from long-term economic data (Guiliano and Spilimbergo 2010)).

Furthermore, age-diversity research would benefit from further development of instruments that directly address variables directly related to the age perspective, rather than making use of age as a proxy variable. For example, generational research would benefit from further study of the impact of formative experiences on work-related variables.

Additionally, beyond studying age and generational perspectives separately, we recommend investigating possible interactions between age and generation-related variables. Howe and Strauss (2007), for example, argued that each generation changes in its own unique way over the course of its members' lives, suggesting that generational values not only provide a frame of reference but also allow for change over the course of people's lives. Other avenues include studying age, period and cohort from a social-constructivist perspective (Elder 1994). Elder (1994: 5) suggested that 'the life course can be viewed as a multi-level phenomenon, ranging from structured pathways through social institutions and organisations to the social trajectories of individuals and their developmental pathways'.

Finally, in our review we noticed that empirical studies on age diversity in PCs had primarily been collected in Europe. Future research would benefit from perspectives relating to other cultures, including the USA and Asia.

In terms of practical implications for managers and HR professionals, we conclude that most studies did indeed find age-diversity effects on the employment relationship, albeit with mixed results. Although additional study is required to further elucidate the complicated interactions between age, period and cohort effects, we believe that age diversity will create new fault lines and different perspectives concerning the employment relationship, with potential conflicts. Therefore, we recommend managers and HR professionals carefully assess the current evidence on age diversity and avoid stereotyping employees based on age, generation or otherwise until more conclusive evidence becomes available.

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28

Career Management Over the Life-Span

Ulrike Fasbender and Jürgen Deller

Introduction

Career management over the lifespan has become increasingly important due to the extension of working lives in most developed and many developing countries. The extension of working lives, in fact, is a politically enforced phenomenon as a reaction of more or less constantly low birth rates and increased life expectancies that have caused global population ageing. In the last decade, several developed countries have introduced new regulations to gradually increase retirement age (i.e., eligibility age of receiving a public pension) from 65 to 67 in the mid-term future (e.g., Australia, Canada, Denmark, France, Germany, Greece, Israel, Netherlands, Poland, Spain, or the USA) (Organization for Economic Cooperation and Development [OECD] 2013). Further, plans to increase the retirement age even beyond 67 exist in some countries, such as in the UK, which plans an increase of retirement age to 68 between 2044 and 2046 (OECD 2013). In addition to the normal retirement age, some countries have implemented a policy to allow people, who have contributed for a certain time (e.g., 40 years in Greece or 45 years of

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minimum contributory record in Germany), to receive a public pension before retirement age (e.g., starting from 62 in Greece or 63 in Germany) (OECD 2013; German Statutory Pension Insurance Scheme 2015). These new regulations will have a critical impact on the labour market in the future.

These days, the labour force participation rate in many developed countries (e.g., Australia, Canada, Denmark, France, Germany, Greece, Israel, Netherlands, Poland, Spain, the UK, or the USA) decreases at higher age groups as can be seen in Fig. 28.1. Although there are differences between the selected countries, an inverted U-shape is clearly visible for all of them. A high labour force participation rate can be found for the middle age groups 25–34, 35–44, and 45–54. In these three age groups, the labour force participation varied only little between the selected countries (25–34: 81.2–89.1 per cent, average of 85.3 per cent; 35–44: 82.2–90.1 per cent, average of 87.1 per cent; 45–54: 78.3–88.5 per cent, average of 83.9 per cent). A medium labour force participation rate can be found for the young and old age groups 15–25 and 55–64. Further, in these age groups the labour force participation varied quite a bit (15–25: 28.0–67.4 per cent, average of 51.1 per cent; 55–64: 41.1–69.1 per cent, average of 59.8 per cent). A low labour force participation rate can be found in the oldest age group, also with great variations between the selected countries (65–69: 4.6–38.6 per cent). However, although the labour force participation decreases among higher age groups, it has increased over time. For example, in Germany, the labour force participation rate has increased sharply for the older age groups over the last 10 years (i.e., 2005–2014 for people aged 55–59: 73.3–81.0 per cent; 60–64: 31.7–55.8 per cent; 65–69:

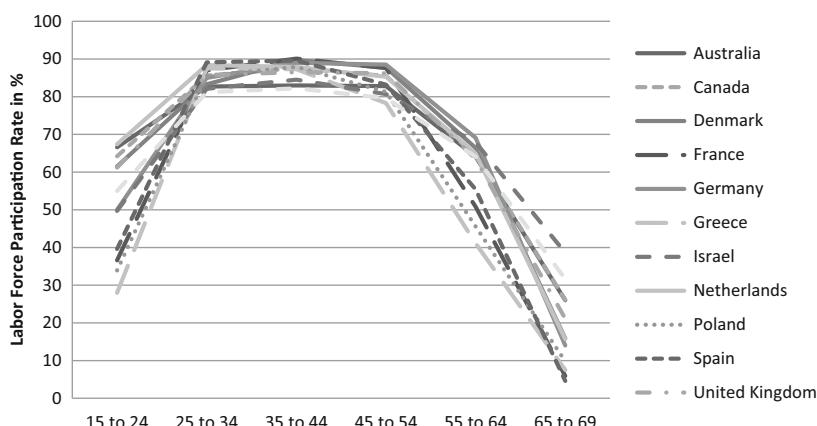


Fig. 28.1 Labour Force participation rate across different age groups in 2014
(Data Source: OECD 2016)

6.6–14.0 per cent) (OECD 2016). In the future, a further rise of labour force participation among older age groups can be expected due to the new regulations to increase retirement age being introduced.

With extending working lives becoming more prevalent in the contemporary society, workplaces have become more age-diverse in nature (Truxillo et al. 2015). This has the potential to facilitate positive outcomes (e.g., increased employee well-being and organisational commitment, Lehmann-Willenbrock et al. 2012 or higher team performance, Wegge et al. 2008). Yet, there is a risk that the increased age diversity produces negative outcomes due to emerging “faultlines” between different age groups (van Knippenberg et al. 2011). For this reason, the understanding of career management over the life-span is of increasing importance. The present chapter will highlight career management over the life-span from both the individual and the organisational perspective. To begin with, we provide a working definition of career and career management, and then conceptualise the phenomenon of generation(s), the different meanings of age, and career development over the life-span. Further, we outline individual career management based on social cognitive career theory. Also, we discuss its relevant proximal and distal antecedents. In addition, we introduce organisational career management by differentiating and comparing prevalent stereotypes and empirical findings on age-related differences at work. In order to link individuals’ interests, strengths, and potentials to organisational success, we derive evidence-based career management strategies and practices for human resource management. This will be followed by implications for future research and a conclusion on career management over the life-span.

Career and Career Management

Social and economic changes, such as organisational restructuring, increased global competition, higher levels of education, and rapid technological development have led to a renunciation of long-term employment (Baruch and Bozionelos 2011; Sullivan 1999). As a consequence, there has been “a shift away from stable, upward, linear career paths motivated by loyalty and stability, toward dynamic, multi-directional and boundaryless career paths motivated by the pursuit of individualistic goals and values” (Lyons et al. 2015: 9). Taking these changes into account, we provide a working definition of career and career management in this section.

In contrast to the popular understanding of career as advancement (i.e., moving up the “career ladder”) or career as profession (i.e., occupations with clear pattern of systematic upwards development), Hall (2002) defines

career as “the individually perceived sequence of attitudes and behaviours associated with work-related experiences and activities over the span of the person’s life” (p. 12). Following this definition, a career is not limited to certain professional occupations; rather it refers to all types of occupations. In addition, a career includes both paid and unpaid activities related to work and organisational settings, thus including homemaking or voluntary work. Further, this definition highlights career as a subjective experience and a life-long process of evaluating both subjective (i.e., attitudes) and objective (i.e., behaviours) aspects of work-related activities. This indicates that career success or failure is best understood from the careerist perspective (i.e., the person whose career is looked at) rather than any other interested parties, such as employers, spouses, or friends. In emphasising the individual perspective, Hall (2002) explains that because there are no absolute criteria, the evaluation of a career is best done by the careerist in line with his or her own specific evaluation criteria. Also, Hall (2002) argues that the contemporary prevalent ethic of self-direction and internal control leads to the rising recognition of individuals’ right and responsibility to make certain (life and) career choices.

Based on the definition of career as a sequence of work experiences over the lifespan, Voelpel et al. (2012) highlight the intersection of individual and organisational interests. As employees’ individual career success is likely to facilitate organisational success (Judge et al. 1999), organisations have an increasing interest in managing employees’ careers. There are several attempts at investigating the individual and organisational success factors (e.g., Judge et al. 1995; Seibert et al. 2001; Wayne et al. 1999). A meta-analysis by Ng et al. (2005) revealed that both individual and organisational career management are likely to support career success (i.e., salary, promotion, and career satisfaction). For this reason, we investigate career management from the individual and the organisational perspective. On the one hand, career management can be defined as the individual planning and decision-making process and on the other hand, career management refers to organisational career development strategies that include a wide range of tools, such as personal training and skill development methods (Voelpel et al. 2012).

Age, Generation(s), and Career Development Over the Life-Span

In order to understand career management over the lifespan, it is important to differentiate and compare the concepts of age, generation(s), and career development over the life-span regarding their theoretical embeddedness.

In this section, we briefly discuss the phenomenon of generation(s) and conceptualise the different meanings of age, as well as introduce career development over the lifespan.

Understanding the Phenomenon of Generation(s)

Defining generations is a challenging matter due its conceptual complexity. Attempts to understand the generational phenomenon can be traced back to the early 1950s (Parry and Urwin 2011). As one of the most notable works on the sociological foundations of generations, Mannheim (1952) elaborated the existence and transition of generations based on five characteristics in society: (1) emerging of new members in the cultural process; (2): disappearing of former members; (3) participation of members is temporally limited in the historical process; therefore (4) transmission of cultural heritage; and finally (5) continuous transition from generation to generation (Parry and Urwin 2011). As a result, a generation is rather a “social location” than a “concrete group”. Members of a generation have a common location in the social–historical process as they share the same year of birth (Parry and Urwin 2011). As such generations refer to a group of people born over a certain span of years (Strauss and Howe 1991). Based on generational cohort theory, researchers have conceptualised generations as birth cohorts sharing economic, political, and social events as a source of generational identity (Pritchard and Whiting 2014). Extending this approach, Joshi et al. (2010) highlight different facets of generational identity, which are cohort-based identity, age-based identity, and incumbency-based identity. Further, Lyons et al. (2014) relate the generational phenomenon to career-related factors, such as career development. Due to the plurality and entanglement of its different approaches, the phenomenon generation(s) is a rather abstract concept that does not allow making tangible propositions about career management. In contrast, age is a more concrete concept allowing a higher degree of elaboration with regard to career-related behaviour. In the following, we, therefore, reveal the different meanings of age that are useful to understand career management from a work–lifespan perspective.

Conceptualisation of Age and Its Different Meanings

With regard to the work context, age has five different meanings (Kooij et al. 2008). First, chronological age refers to the calendar age, which has often been criticised due to its simplification of the aging process. Although the

boundaries for age groups are not fixed, research often describes people above 50 years as older workers (Finkelstein et al. 2013). Second, functional age is based on workers' performance recognising the great variation of individual abilities and functions across different ages. Over time, biological and psychological changes influence the functional age of people. Third, subjective age refers to the social perception of age indicating how old someone behaves and feels in comparison with a certain age cohort (Kaliterna et al. 2002). Different age norms shape the individual perception of age with regard to occupation, affiliation, or society. Fourth, the organisational age refers to the seniority within job or organisation, sometimes reflecting a certain career stage. Fifth, the lifespan concept of age contains some elements of the other meanings of age but advances the concept of age with regard to the behavioural changes during the life cycle (Kooij et al. 2008). According to this meaning, many factors (e.g., normative, age-related biological, environmental determinants) are likely to impact the aging process, which, in turn, influences career-related behaviour (Kooij et al. 2008; De Lange et al. 2006). Therefore, the lifespan concept of age is particularly useful for explaining career-related behavioural change that takes place in different career stages.

Career Development Over the Life-Span

Relying on the lifespan concept of age, career management includes the development of career-related interests, goals, decisions, and actual behaviour over the lifespan. In this section, we reveal career development over the lifespan focusing on career-related behavioural changes according to the different life stages based on the career development theory (also known as lifespan, life-space theory of careers, or theory of vocational development; Super 1953, 1990). Despite rapid change, turbulence, and increased complexity, life and career stages are still relevant; yet, they are less defined, linear, and predictable as they used to be (Hall 2002).

To begin with, career development over the lifespan requires life-space that people use for their career as part of their life (Hartung 2013). People take multiple roles in life based on the constellation of their different social positions (Fasbender and Deller 2015). For instance, a person occupies the role of being a spouse, mother, sister, friend, golfer, and volunteer next to her work role. Although the work role is clearly an important role for many individuals but yet, it is only one among others. A person's multiple roles interact with each other based on the resources (e.g., energy, money, or time) that are available. Therefore, career choices depend on the circumstances related to the

different social positions. Referring to the previous example, with the birth of her second child, she may have fewer resources available for her work role than before depending on the social support from significant others (e.g., spouse, parents). This illustrates how multiple roles interact with each other in relation to environmental factors. Further, it is important to note that the allocation of resources between people's multiple roles refers to the meaning that each role has in their lives (Fasbender and Deller 2015).

With increasing age, career development refers to several (forwards and backwards) transitions from one life stage to another as can be seen in Fig. 28.2. In a prototypical career pattern, people pass through a sequence of life stages (i.e., growth, exploration, establishment, maintenance, and disengagement or re-engagement) involving different career-related tasks over the life-span. Yet, the unique interplay of self and relevant environmental factors yields in significant individual differences within this sequence (Hartung 2013). Thus, career management over the lifespan may form stable, unstable, or even multiple-trial career patterns (Hartung 2013). In the following, we describe the five life stages and its career-related tasks.

Growth The growth stage (spanning *birth* to *age 13*) involves the initial career-related tasks curiosity, fantasies, interests, and capacities answering the question "Who am I?" (Super 1990). In this life stage, children start learning to gain control over their life, to enhance confidence in their abilities, and to make decisions. Children internalise social competencies by getting in touch with other children and balancing competitive and cooperative behaviour to achieve aims and build relationships with others. In addition, by recognizing time as relevant factor, children develop a perspective for the future. Adults support children in developing their competencies by acting as role models and advisors. Overall, the growth stage helps children to set the foundation for their vocational self-concept.

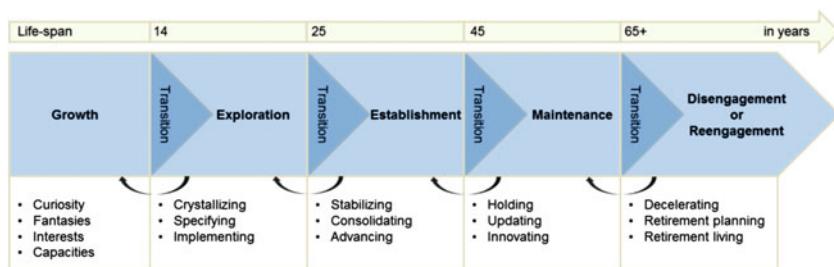


Fig. 28.2 Career development over the life-span

Exploration The exploration stage (spanning *ages 14–24*) involves the career-related tasks crystallizing, specifying, and implementing an occupational choice and preparing for work (Super 1990). To begin with, young adults explore the world around them and imagine themselves in various occupational roles and contexts. By reflecting on their preferences, young adults transfer their initial vocational experiences into educational and occupational choices. The exploration stage is completed if young adults have implemented their educational or occupational choices by selecting a training course, preparing, and, finally, obtaining a selected vocational position.

Establishment The establishment stage (spanning *ages 25–45*) involves the career-related tasks stabilizing, consolidating, and advancing the occupational self-concept to secure the obtained work role (Super 1990). In this stage, people settle into their new position by fulfilling their core job duties and assimilating to the organisational culture. Further, people consolidate their occupational position by demonstrating effective work attitudes, positive relationships to their colleagues, sustained work. Eventually, people pursue new levels of responsibility to move further to positions at higher levels within or outside of their organisation. As a result, successful establishment leads to a consistent integration of the self to the work role, which, in turn, yields to a secured income and enhanced meaning in life.

Maintenance The maintenance stage (spanning *ages 45–65*) involves the career-related tasks holding, updating, and innovating the established work role (Super 1990). Most people experience the transition from the establishment to the maintenance stage as a critical reflection of their current position, evaluating their job satisfaction and at the same time, examining relevant goals that help determining their future career direction. As a result of this reflection process, people either decide to maintain their current position or change their occupational orientation and return to earlier stages of career development, such as the exploration or the establishment stage (this backwards development is illustrated by the black arrows in Fig. 28.2). Entering the maintenance stage, people hold on to job proficiency and work achievements in order to maintain their secured work position. Complementary, people update their professional abilities, skills, and knowledge to improve their job performance. Also, discovering new challenges and ways of performing tasks may help to prevent dissatisfaction with the daily routine at work, which, in turn, helps to avoid career plateaus or mid-career changes.

Disengagement or Re-engagement The disengagement stage (encompassing ages over 65) involves the career-related tasks deceleration, preparation, and transition to retirement (Super 1990). In this stage, most people experience decreased energy and interest for their occupational role, which yields to reducing working hours, slowing down the job and at the same time passing over knowledge, skills, and tasks to the next generation (Hartung 2013). In many cases, this leads to a complete separation of the self from work, which requires most people to develop new life structures when entering retirement. Yet, the prototypical career development pattern becomes less meaningful with increasing age as the number of possible development paths multiplies over the life-span. Therefore, it is likely that disengagement evolves in re-engagement (Fasbender and Deller 2015). Because most people have worked for their entire adult life, their self might be closely tied to their work-role identity (Feldman 1994), which encourages them to re-engage in work after formal retirement entry (Fasbender et al. 2016; Griffin and Hesketh 2008; Wöhrmann et al. 2016).

Individual Career Management

Individual career management can be characterised as an ongoing process of planning and decision-making towards individual work and life goals. In particular, individual career management involves taking responsibility and ownership for one's career path rather than expecting the organisation to manage one's career (Lytle et al. 2015). In this section, we conceptualise individual career management based on social cognitive career theory (Lent et al. 1994). First, we introduce the social cognitive foundations of individual career management. Second, we highlight the process of career self-management. And third, we reveal its different proximal and distal antecedents.

Social Cognitive Foundations of Individual Career Management

Triadic Reciprocity Between Person, Environment, and Behaviour More than two decades ago, Lent et al. (1994) introduced social cognitive career theory in order to explain the career management process from interest development to performance attainment. This career management process model has its roots in Bandura's (1986) general social cognitive theory, which describes an interaction between person, environment, and behaviour as

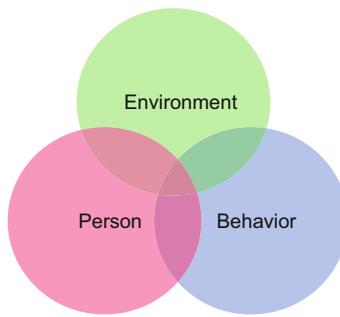


Fig. 28.3 Triadic reciprocity between person, environment, and behaviour

can be seen in Fig. 28.3. This interactive relationship is often called *triadic reciprocity*, which means that all three elements influence each other in a bidirectional way. Personal factors refer to internal capabilities including cognitive, emotional, and physical resources. Environmental factors refer to external resources and the surrounding conditions. Further, behavioural factors refer to decisions and actions that are carried out by the person (in contrast to his or her capabilities). While earlier approaches have described behaviour as a function of the interaction between personal and environmental factors, this three-way approach revealed behaviour as a bidirectional feedback mechanism. This simply means that people's decisions and actions modify environmental factors and reflect people's affect, thoughts, and interfere with subsequent behaviour (Fasbender and Deller 2015).

Based on the triadic reciprocity between person, environment, and behaviour, the career self-management process model reveals a person's cognitive resources as determinants for self-directed career behaviour. Among these cognitive resources are self-efficacy, outcome expectations, and personal goals that involve different self-regulatory and self-reflective processes as central elements of individual career management.

Self-Efficacy Self-efficacy can be conceptualised as the belief in one's own capabilities to manage a situation and take relevant action in order to accomplish self-directed goals (Lent and Brown 2013). Within the motivational orientation, a person's belief about the own self-efficacy empowers him or her as a proactive agent of career-directed behaviour (Bandura 1986; Fasbender and Deller 2015). Rather than being an overall evaluation of self-worth (i.e., self-esteem), self-efficacy involves a dynamic set of beliefs directly related to particular career or performance domains (Lent 2013b). As such, a person

could have strong self-efficacy beliefs about his or her ability to deal with social tasks (e.g., to engage with different types of people) but feel less competent to deal with manual or technical tasks (e.g., to screw different metal parts in place). Further, self-efficacy can be distinguished in different types. *Content or task-specific efficacy* refers to one's belief about being able to deal with specific tasks and fulfil necessary career-related requirements (e.g., having relevant knowledge and work experience to fulfil a specific task) (Lent 2006). *Coping efficacy* refers to one's belief about being able to cope with career-related obstacles (e.g., discrimination at work) (Lent 2006). *Process efficacy* refers to one's belief about being able to manage career transitions (e.g., career preparation, entry, and adjustment, role shift, and change across diverse occupational paths) (Lent 2006).

Outcome Expectations While self-efficacy is grounded in the question, "can I do this?", outcome expectations refer to the question, "what will happen if I try" (Lent 2013b). In particular, outcome expectations can be conceptualised as the anticipation of the likely consequences of a person's behaviour. In particular, outcome expectations refer to the anticipation of *physical* (e.g., additional source of income), *self-evaluative* (e.g., work-role identity, self-satisfaction), and *social* (e.g., approval from others, intergenerational contact) outcomes that are involved in career-related decision-making (Lent 2013b).

Personal Goals Personal goals refer to the question, "how much and how well am I willing to do this" (Lent 2013b). As a person is more than a mechanical performer reacting on environmental forces, he or she acts as proactive agent, who applies personal goals systematically guiding a course of action to attain desired outcomes (Bandura 1986). In particular, personal goals can be conceptualised as the intention to carry out career-related behaviour in order to produce beneficial outcomes in line with one's motivational orientation (Lent 2013a). Personal goals vary in their degree of specificity and proximity to actual behaviour (Lent and Brown 2013). As such, goals can be distinguished into specific career intentions and general career goals. While specific career intentions refer to a destined willingness to pursue career-related actions, general career goals refer to overall occupational aspirations that exist independent of real consideration or commitment. Further, personal goals can be differentiated in choice goals and performance goals. On the one hand, *choice goals* refer to a certain type of behaviour that a person wishes to realise within a given task or domain (Lent 2013b). On the other hand, *performance goals* refer to the quality of performance that a person wishes to achieve in relation to the chosen type of behaviour (Lent 2013b).

Career Self-Management Process

As can be seen in Fig. 28.4, the career self-management process model can be differentiated in the core career self-management process (shown in shaded boxes) and its proximal and distal antecedents (shown in white boxes). To begin with, we will explain the core career self-management process involving how self-efficacy, outcome expectations, and personal goals are related to actions and outcome attainments.

In the core career self-management process, self-efficacy and outcome expectations can be seen as the initial antecedents of career behaviour. The two mechanisms promote a person's actions directly and indirectly via personal goals. Initially, the certainty of outcome attainment is decisive for the way that self-efficacy and outcome expectations determine career-related behaviour. Under very certain conditions (i.e., a high quality of performance guarantees specific outcome attainments), self-efficacy will be the predominant factor that determines career-related behaviour. Under rather uncertain conditions (i.e., outcome attainments are only loosely bound to the quality of performance), outcome expectations are of central importance for career-related behaviour. For instance, an employee, who has worked for over 10 years for an organisation with a consistently high performance quality, might be offered to continue working after formal retirement entry (i.e., receiving a state pension). However, due to the organisation's scepticism referring to the

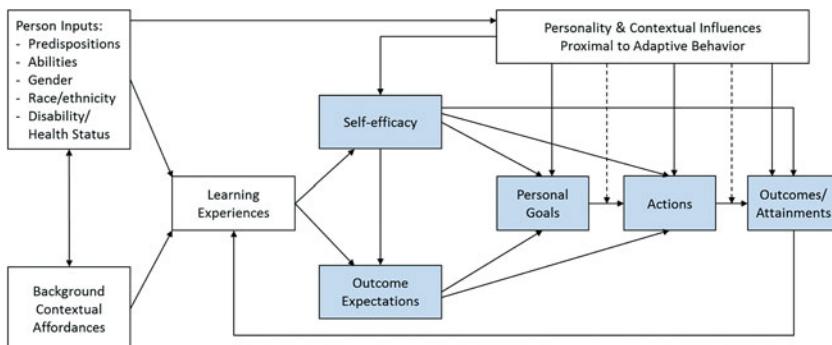


Fig. 28.4 Career self-management process (Source: Adapted from: toward a unifying social cognitive theory of career and academic interest, choice, and performance. From Lent et al. 1994, Journal of Vocational Behavioral, 45, p. 93. Copyright 1993 by R. W. Lent, S. D. Brown, & G. Hackett. Reprinted with permission. Note: Direct effects are indicated with *solid lines*; moderator effects (where a given variable strengthens or weakens the relationship between two other variables) are indicated in *dashed lines*)

employee's work ability, his or her opportunity to continue working might be rather uncertain. Following this example, the employee's self-efficacy as well as his or her outcome expectations are central for goal setting that together facilitates career-related outcome attainment. Should the employee believe that he or she is able to convince the organisation to hire him or her after formal retirement entry based on his or her capabilities, knowledge, and work experience (i.e., positive outcome expectations), the employee might (indirectly) be more likely to be hired. Now, should the employee believe that the organisation will not be interested in him or her because of the negative images that the organisation holds towards older workers (i.e., negative outcome expectations), the employee is likely to have lower chances to be hired independent from his believed capabilities to continue working for the organisation in retirement (i.e., self-efficacy).

That personal goals reflected in intentions determine behaviour has been proposed by various theoretical approaches, such as the goal setting theory (Locke and Latham 1990), the theory of planned behaviour (Ajzen 1991), or the social cognitive theory (Bandura 1986). Also, these theoretical approaches emphasise on specific qualities that are relevant for goals in effectively determining behaviour. With regard to these qualities, personal goals should be (1) explicit, (2) specific, (3) openly stated, (4) compatible with personal values, and finally, (4) proximal to the actual behaviour (Brown and Hirschi 2013). In a nutshell, self-efficacy, outcome expectations, and personal goals are important determinants of career-related actions. In particular, actions that are goal-directed have a high likelihood to promote the desired outcome attainments compared to non-goal-directed actions. A person, for instance, who is actively seeking for a job, will be more likely to obtain a favourable job compared to someone, who is neglecting to communicate his or her occupational aspirations to others. Also, self-efficacy is directly related to outcome attainments through its central role of organising, supporting, and persisting career-related behaviour.

Antecedents of Individual Career Management

The antecedents of individual career management can be differentiated in proximal antecedents and distal antecedents. Proximal antecedents directly influence the core career self-management process, in particular personal goals, actions, and outcome attainments, while distal antecedents indirectly influence the career management process through learning experience as central sources of self-efficacy and outcome expectations (i.e., the very initial antecedents of career self-management).

Contextual Factors and Personality as Proximal Antecedents As can be seen in Fig. 28.4, contextual factors are among the proximal antecedents of career self-management. There are objective characteristics and perceived characteristics of the environment that facilitate, restrain, or override other factors involved in the career management process, such as personality. Barriers, opportunities, and support vary in their perceived importance to individual career management, which reflects the active role that people take in interpreting the contextual factors around them (Lent et al. 1994). In the eye of the beholder, the absence of barriers (e.g., low work stress and low physical demand as good working conditions), environmental support (e.g., social or financial support), and other work-related factors (e.g., intrinsic motivation, job satisfaction, work centrality) facilitate individual career management. These contextual factors influence outcome attainment directly and also indirectly via self-efficacy, personal goals, and actions that, in turn, convey into outcome attainments (Brown and Hirschi 2013).

In particular, opportunity structures can be seen as highly relevant contextual factors that shape career-related behaviour. In many cases, sufficient educational and socioeconomic conditions enable people to transfer their interests into personal goals. However, the interests that people have are not necessarily related to the career choices they take. For instance, it can be expected that people working in coal mines do not necessarily work out of interest to the domain but for financial reasons, indicating how different interests and career choices can be (Fasbender and Deller 2015). Therefore, it is important to note that some people are in the favourable position to build their career path according to their individual interests, abilities, and skills, while others might be in a less favourable position, which forces them to take any job that is available for money (Fasbender and Deller 2015). Hence, opportunity structures are a central issue when it comes to understanding career development (Lent et al. 1994).

Supplementary to contextual factors, personality is among the proximal antecedents of individual career management. Consisting of a relatively stable set of different dimensions (i.e., traits), personality is expected to constitute people's endogenous tendencies of feeling, thinking, and acting (Brown and Hirschi 2013). Among the big five personality dimensions, *conscientiousness* as the tendency to be self-disciplined and responsible seems to be most important for individual career management, in particular for planning and persistence of the career-related behaviour (Brown and Hirschi 2013). Other personality dimensions are likely to facilitate career behaviour related to interviewing and networking. *Agreeableness* as the tendency to be cooperative and

loyal as well as *extraversion* as the tendency to be enthusiastic and action-oriented may help coping with social interactions, while *emotional stability* as the tendency to be calm, stable, and relatively exempt from persistent negative emotions, may facilitate dealing with ambiguous situations (Brown and Hirschi 2013). In addition, *openness to experience* as the tendency to be curious and imaginative may support career behaviour that involves imagining or reflecting diverse and possibly unconventional options to solve problems (Lent and Brown 2013).

Learning Experiences as Mediator of Distal Antecedents Self-efficacy and outcome expectations do not function in a social vacuum but rather operate in interaction with other central person inputs and its background environments, such as ethnicity (or race), gender, genetic predispositions, abilities (or disabilities), and physical health in relation to contextual affordances. It is important to note that person inputs determine career-related behaviour mainly indirectly through learning experiences (i.e., mediator), which, in turn, convey into self-efficacy and outcome expectations. The mediating role of learning experiences is grounded in four types of learned information, namely personal achievements, social encouragement and influence, observational learning and modelling, and physiological and affective states (Lent and Brown 2013).

Learning experiences function as a feedback loop reflecting previous outcome attainments that help to stabilise or revise self-efficacy and outcome expectations. At the same time, person inputs prepossess this feedback loop through social and psychological effects that emerge with career-related behaviour. For instance, people of different age groups face age-related role socialisation processes that may benefit or hinder their career development (Fasbender and Deller 2015). Following this example, in the work context, physical deprivation and decreasing work ability are often accepted as a by-product of the aging process independent of individual differences. These rather negative views on aging might hinder older people's learning experiences (e.g., through lower opportunities offered) compared to their younger counter parts, which, in turn, interferes with the entire career self-management process. Certain person inputs, such as genetic predispositions, abilities (or disabilities), and physical health, and contextual affordances can influence individual career management to a large extent reflecting a socially constructed reality that apparently runs in the background but yet, powerfully impacts self-efficacy and outcome expectations through the mediating role of learning experiences (Lent 2013b). At times, this can

cause misleading implications for individual career management based on a skewed understanding of career-related interests, goals, and choices to be “right or wrong” for certain types of people (Lent 2013b).

Organisational Career Management

In this section, we will discuss organisational career management. To begin with, we address the prevalence of common age stereotypes as barriers of career management. This is followed by empirical findings on age-related differences at work. Finally, we will highlight career management strategies and practices for human resource management that help guiding career management over the life-span.

Age Stereotypes as Barriers of Organisational Career Management

Workers’ age is mainly a visible attribute referring to an important and often automatic evaluation of others such as supervisors or colleagues. This evaluative process is influenced by age stereotypes, which imply positive or negative attitudes towards certain age groups (i.e., younger vs. older workers; Fasbender *in press*). Usually, the prevalence of age stereotypes at work is in favour of younger over older workers in most highly developed countries, in line with a strong general youth centeredness in Western countries (Zacher 2015). In contrast, being old is often associated with negative evaluations at work, such as decreasing performance, declining physical capabilities and health, dependency on other people and financial burden to the organisation (Zacher 2015), resulting in less organisational support for older workers’ careers (Shore et al. 2009). However, most of these older workers’ myths have been empirically shown to be untrue and for some of them the opposite has been found to be true (Fasbender *in press*; Hertel et al. 2013; Ng and Feldman 2012).

Independent of their validity, age stereotypes can lead to age discrimination at work hindering organisational career management with negative consequences for the affected workers but also for the organisation as a whole (Fasbender *in press*). There are different mechanisms of transferring age stereotypes into discriminatory behaviour at work. On the one hand, managerial decisions about career opportunities and rewards might be blurred reducing group performance and organisational success (Hertel and Zacher

in press). On the other hand, age stereotypes are likely to be believed by the older workers themselves, leading to self-fulfilling prophecies, which, in turn, strengthen age stereotypes as a vicious circle. Research has shown that beliefs of older workers either buffer or reinforce certain behaviours. For instance, Greller and Stroh (2004) indicated that negative stereotypes about older workers' development abilities are likely to impede taking roles and learning in different environments. Further, Gaillard and Desmette (2008) found that a strong identification with being an "old worker" shapes early workforce exit intentions and psychological detachment from work. Yet, another study revealed that managers' favourable beliefs about older workers buffered the negative relationship between age and training and development willingness (Van Vianen et al. 2011), reflecting the importance of handling age stereotypes in organisational career management.

As a result, understanding and dealing with age stereotypes at work becomes a major task for managers and human resource professionals in organisational career management. It is necessary to critically challenge prevalent age stereotypes and implement processes and procedures to impede discriminatory behaviour at the workplace in order to manage an increasingly age-diverse workforce and create an asset rather than a liability for the organisation.

Empirical Findings on Age-Related Differences

After describing the prevalence of common age stereotypes as barriers of career management, it is also relevant to distinguish stereotypes from empirical findings. In the following, we, therefore, introduce different domains relevant for organisational career management. The following summaries are adopted from Hertel and Zacher (in press).

Cognitive Abilities Ever since the evolving of research in the field of organisational psychology, cognitive abilities have received plenty of attention due its importance for the work context (e.g., Hertel and Zacher in press; Müller et al. 2015; Salthouse 2012). With regard to career management over the life-span, cognitive abilities can be distinguished in *fluid intelligence* (i.e., abstract reasoning, problem solving, and working memory) and *crystallized intelligence* (i.e., general knowledge, verbal compression and vocabulary) (Hertel and Zacher in press). Research using cross-sectional data shows that crystallized intelligence is rather stable or increases over the work-life-span, while fluid intelligence decreases with age after its peak in the early-20s (Verhaeghen and Salthouse 1997). A recent study by Klein et al. (2015), for instance, revealed

that older executives achieved higher scores on verbal ability (i.e., crystallized intelligence) but lower on figural and inductive reasoning (i.e., fluid intelligence) than their younger counterparts. Further, research using longitudinal data shows that the decline of fluid intelligence starts at a later point of time (around the age of 60) but is more pronounced in later years (Schaie 2012). However, results need to be applied with caution to organisational settings as general improvements of cognitive abilities appeared across different birth cohorts (i.e., the “Flynn effect”) undermining the role of age-related differences (Hertel and Zacher in press). In addition, sociocultural changes are assumed to further increase the cognitive abilities of (younger and) older workers (Gerstorf et al. 2011; Salthouse 2015; Skirbekk et al. 2013).

Physical Capabilities and Occupational Health Generally, becoming older goes along with declining physical capabilities (e.g., cardiovascular and respiratory functions, immune response, muscle function, neurological function, and sensory function) that vary to a large extent between people (Maertens et al. 2012). Health, however, implies more than physical capabilities, and it is a multidimensional concept that has been defined as “a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity” by the World Health Organisation (1948: 28). Further, during the aging process people develop strategies to deal with their age-related changes, namely the *selection* of high priority goals resulting in personal control and satisfaction, the *optimisation* of remaining skills and abilities enhancing life, and the *compensation* of experienced cognitive or physical losses by applying personal strategies and using technological resources (Baltes and Baltes 1990). From an occupational perspective, a recent meta-analysis by Ng and Feldman (2013) revealed that employee age is only partly related to health supporting the selection, optimisation, and compensation model (SOC; Baltes and Baltes 1990). Employee age has been found to be positively related to objective measures of physical health including blood pressure ($\rho = .34$), body mass index ($\rho = .21$), cholesterol level ($\rho = .20$), and self-reported measures of muscle pain ($\rho = .14$) and insomnia ($\rho = .12$). However, employee age has been found to be unrelated to subjective physical health ($\rho = .00$). Further, employee age has been found to be negatively related to measures of mental health including anger ($\rho = -.15$), fatigue ($\rho = -.10$), irritation ($\rho = -.09$), negative mood ($\rho = -.10$), and low positive mood ($\rho = -.08$). The results highlight that it is important to focus on coping strategies for age-related changes in occupational health as part of organisational career management.

Socio-emotional and Self-Regulation Skills Besides cognitive and physical capabilities, socio-emotional and self-regulation skills are highly relevant for career management and positive work outcomes. Overall, research revealed that socio-emotional skills increase with higher age (Blanchard-Fields 2007). As such, older people tend to process information gathered from positive emotions more deeply than information from negative emotions (Löckenhoff and Carstensen 2007). Further, older people appear to be less affected by social conflict situations, being more faithful and forgiving, and also applying a broader range of emotion-regulation strategies, which, in turn, leads to advanced self-regulation skills and helps maintaining well-functioning social relationships at work (Scheibe and Zacher 2013). A recent study, for instance, revealed that age-related gains in self-regulation skills buffer negative effects of intrapersonal conflicts on work motivation (Thielgen et al. 2015). Further, self-regulation skills support active stress-coping strategies at work (Hertel and Zacher in press), which, in turn, facilitate positive work outcomes.

Work Motivation In addition to people's skills and abilities, their work motivation is a central factor for the work context. Often lacking skills can be compensated with high levels of work motivation and related job attitudes (e.g., job involvement or organisational identification) as younger and older workers hardly work at their maximum (Hertel and Zacher in press). In contrast to the common stereotypes, a meta-analysis revealed that work motivation is rather positively related to employee age ($\rho = .11$; Ng and Feldman 2012), while training motivation seems to be negatively related with employee age ($\rho = -.05$; Ng and Feldman 2012). Similar results can be found from another meta-analysis investigating the relationship between age and work-related motives. The findings indicate that older people tend to have lower growth motives ($\rho = -.14$), security motives ($\rho = -.08$), and extrinsic motives ($\rho = -.10$) but higher intrinsic motives ($\rho = .07$) to work compared to their younger counterparts (Kooij et al. 2011). In addition to work motivation, research revealed positive relationships between employee age and relevant job attitudes. For example, older workers have been found to report higher affective commitment ($\rho = .24$), job involvement ($\rho = .25$), interpersonal trust ($\rho = .17$), loyalty ($\rho = .21$), and organisational identification ($\rho = .20$) than their younger colleagues (Ng and Feldman 2010). Summarising the empirical findings on age-related differences with regard to work motivation, older workers appear to have meaningful strengths compared to their younger colleagues. Thus, older workers appear to have higher overall work motivation (in particular, intrinsic motivation) and related job attitudes (such as

job involvement and organisational identification), while younger workers appear to be motivated by learning and development outcomes at work (such as training motivation or growth motives).

Work Performance In fact, work performance is a highly relevant factor to be considered for organisational career management. As work performance can be seen as function of abilities, skills, and motivation, it is closely related to the previously introduced findings on age-related differences. Over the last three decades, four different meta-analyses have countered the pervasive stereotype that older workers perform worse than younger workers (i.e., McEvoy and Cascio 1989; Ng and Feldman 2008; Sturman 2003; Waldman and Avolio 1986). Taken together, the empirical findings suggest that employee age and work performance are largely unrelated. The most recent meta-analysis from Ng and Feldman (2008) has analysed the age-performance relationship with respect to ten different dimensions. While employee age has been found to be largely unrelated with creativity, performance in training programs, and core task performance, small positive relationships were identified for general organisational citizenship behaviour (external-rated, $\rho = .08$) and safety performance (self-rated, $\rho = .10$). Further, negative relationships have been identified for general counterproductive work behaviour (external rated, $\rho = -.12$), workplace aggression (self-rated, $\rho = -.08$), on-the-job substance use (self-rated, $\rho = -.07$), tardiness (external rated, $\rho = -.28$), and absenteeism (objective measures, $\rho = -.26$). Even though, most effect sizes were rather small or statistically non-significant, older workers seem to perform rather well compared to younger workers. However, it is important to focus on the underlying mechanisms and intra-individual change over time. It could be assumed that the zero relationships are due to compensation of gains and losses over the life-span. For instance, the decline in fluid intelligence could be compensated with higher levels of conscientiousness, which, taken together, appears to have no effect on the overall work performance (Hertel and Zacher in press). Therefore, it is highly relevant to consider the underlying process of work performance and its changing resources (e.g., personal characteristics such as abilities, skills, and motivation) for organisational career management.

Career Management Strategies and Practices for Human Resource Management

In order to motivate and retain workers of all age groups, and to maintain their work ability over the life-span, organisations can support individual

career management by focusing on age-related strength and potentials, while compensating for age-related weaknesses ([Hertel and Zacher in press](#)). At the same time, it is important to prevent age discrimination during the entire employment process and organisational functioning. In the following, we outline suggestions for evidence-based career management strategies and practices for human resource management as part of organisational career management.

Selection and Placement To begin with, organisations should critically reflect whether their selection and placement procedures allow employees' career development over the life-span. In order to reduce age discrimination at work, accurate job specification, task analyses, and person specification should underpin personnel decisions about selection and placement of older and younger people at work ([Warr 2001](#)). Keeping the focus rather on relevant job-related attributes rather than on stereotyped judgements facilitates transparency about career development opportunities leading to higher levels of job satisfaction and well-being, which, in turn, increase organisational success. Also, recruitment advertisements should be created in a non-discriminatory way attracting both younger and older workers. At the same time, decision-makers (including human resource professionals as well as line managers) should be reminded that turnover rates are lower among older than among younger employees ([Warr 2001](#)). Further, recruitment messages and sources should be chosen along the preferences and search behaviours of people from different age groups ([Hertel and Zacher in press](#)). For example, communicating which strengths of younger and older workers are valued in the organisation can help attracting and building an age-diverse workforce. Also, it is recommended to ensure unbiased selection and placement procedures, which do not only take the quantity but also the quality of work experiences into account, relating decisions to concrete abilities, knowledge, and skills rather than on chronological age ([Naegele and Walker 2011](#)). Further, organisational performance measurement and reward systems need to involve both younger and older workers' strengths and weaknesses. As such, implementing formal procedures and objective performance indicators may help to prevent age bias. Also, regular diversity training could be implemented as they can reduce age stereotypes, team conflicts, and enhance innovation in age-diverse work teams ([Wegge et al. 2012](#)).

Job Characteristics (Re-)Design Organisations should design or re-design job characteristics to enable employees' career development over the lifespan. To begin with, support systems could be implemented in order to compensate age-related decline relevant for the work context. For instance,

robotics and automation technologies could help to compensate declining physical capabilities (e.g., to reduce muscle pain). Also, technological support (e.g., intelligent personal assistant and knowledge navigator based on voice recognition) could be used to compensate declining cognitive abilities (e.g., working memory). With regard to motivational job characteristics, research revealed that younger workers particularly benefit from feedback and task variety, while older workers prefer autonomy allowing them to demonstrate and pass on their experience, knowledge, and skills (Truxillo et al. 2012; Zaniboni et al. 2013). Further, job characteristic design is particularly relevant for age-diverse teams. Research indicated that age-diverse teams tend to perform well when working on complex tasks, while having more physical health issues when working on routine tasks (Wegge et al. 2008). Also, relevant for the performance of age-diverse teams are leaders that hold positive expectations to their team members and inspire, stimulate, and empower them to perform well (i.e., transformational leadership). Building a common sense of identity (rather than seeing younger and older workers as in- and outgroup) can help to increase team performance (Kearney and Gebert 2009). Therefore, appointing leaders that show transformational qualities or implementing effective training on transformational leadership may support positive outcomes related to organisational career management over the lifespan.

Personnel Maintenance and Development Continuing learning is an essential element of organisational career management, in particular in times of rapid technological and economical changes. To begin with, it is important to note that perceived “maintenance practices” (i.e., practices that help maintaining work performance and well-being at work) have been found to be more efficient for older workers, while perceived “development practices” (i.e., practices that help developing work-performance and organisational functioning) seem to work better for younger workers with regard to relevant job attitudes (Kooij et al. 2010). However, successfully managing careers across different age groups requires differentiated maintenance and development practices that are absorbed by both younger and older workers (Hertel and Zacher in press). Addressing this issue, differentiated feedback mechanisms could be applied in order to reach out to different age groups. As such, research revealed that younger workers react more positively on relevant, specific, and detailed feedback, while older workers react more positively on considerate and favourable feedback (Wang et al. 2015). Further, it is important that organisations offer equal opportunities for continuous learning, maintenance, and development, as well as career progression, transfers, and promotions

(Naegele and Walker 2011). In this regard, career development does not necessarily refer to vertical career moves (i.e., moving up the hierarchy), but also to horizontal career moves, such as becoming a mentor or taking up an organisational ambassador role (Hertel and Zacher in press).

Organisational Culture Finally, shaping an age-sensitive and diversity-friendly organisational culture can be seen as the basis for organisational career management. The deeply rooted beliefs, norms, and values that the members of an organisation share should be free of negative age stereotypes towards both younger and older workers (Staudinger 2015). Organisations differ to a large extent in their favourability of different age groups. Research suggests that the different perceptions organisations hold towards their younger and older workers are influenced by various stakeholders, in particular their top managers (Zacher and Gielnik 2014). It is likely that managers' individual age stereotypes are passed over to employees as a trickle-down process (Hertel and Zacher in press; Rosing and Jungmann 2015). Therefore, it is important to refine top managers' attitudes towards age-sensitive and diversity-friendly concepts, steering an organisational culture that prevents age discrimination at work. In addition, supervisors should encourage and recognise people of different age groups given that these behaviours enhance older employees' work performance and well-being (Wegge et al. 2012; Zacher et al. 2015). Further, research revealed that age-inclusive organisational cultures have positive effects on organisational performance and collective turnover intentions through higher levels of affective commitment and social exchange perceptions (Boehm et al. 2014; Kunze et al. 2011). Hence, implementing, maintaining, and refining an age-sensitive and diversity-friendly organisational culture may facilitate organisational career management.

Future Research Directions

In this section, we offer directions for future research based on the review of literature on individual and organisational career management over the lifespan. First, more research is needed with regard to the later stages of career development. This is particularly important against the background of global population aging and the resulting extension of working lives. While a critical mass of research has mainly focused on careers of younger people (Lytle et al. 2015), it is essential to investigate career management over the lifespan. As such, research needs to address the interests and strengths of different

age groups, including middle-aged and older people in understanding both individual and organisational career management. It is relevant to acknowledge that age might be a proxy but not an explanatory variable in itself for career-related behaviour and changes during the lifecycle. Research should, therefore, consider age-related differences and mediating mechanisms, such as cognitive abilities, physical capabilities and occupational health, socio-emotional and self-regulation skills, and work motivation in exploring long-term career development. Simultaneously, research needs to pay heed to interactions between personal factors (i.e., internal capabilities such cognitive, emotional, and physical resources) and environmental factors (i.e., external resources and the surrounding conditions) in addressing career management over the lifespan.

Second, research should account for measurement issues and respect alternatives to cross-sectional research designs. In order to capture career management from a lifespan perspective typically longitudinal data are preferable. Although there are a range of existing longitudinal data sets covering either career issues often in terms of labour market participation (e.g., the European Labour Force Survey) or developmental aspects of aging (e.g., the Survey of Health, Ageing, and Retirement in Europe), it is necessary to combine different approaches that monitor individual and organisational strategies in managing careers over the lifespan. As such, collective research attempts may be able to capture career patterns and changes from entry to (permanent) exit of workforce and community. Alternatively, research could gather career history data, including retrospective information about each career move. Although such an undertaking is not the ideal approach for behavioural research, it could be helpful to add context when understanding career management for current generations at work. Further, research should take the dynamics of career management into account by investigating curve-linear patterns and changes over time (e.g., applying growth curve and change modelling in analysing the data).

Third, research should differentiate between specific occupations and industries in exploring individual and organisational career management. Previous research has often examined career patterns of knowledge, managerial, and professional workers (e.g., Hirschi and Valero 2015; Lyons et al. 2015; Zellweger et al. 2011). Yet, it would be intriguing to understand to what extent the effectiveness of individual and organisational career management strategies varies among different occupations and industries, in particular in comparing blue- and white collar workers. Further, it would be interesting to consider the cultural background in which career management over the lifespan takes place. Cultural differences (e.g., individualism–collectivism,

hierarchy–equality) may lead to different perceptions of younger and older workers (Marcus and Fritzsche 2016), which in turn is likely to influence individual and organisational career management strategies and their effectiveness. Future research needs to address these issues by applying other organisational and cultural settings (e.g., cross-organisational and cross-cultural comparisons over time).

Conclusion

Against the background of extending working lives, this chapter discussed career management over the life-span from both the individual and the organisational perspective. We introduced and differentiated concepts of age, generation(s), and career development over the life-span as a theoretical foundation for career management. Individual career management was introduced relying on social cognitive career theory, which highlights the individual as a proactive agent for his or her career development. Further, we discussed relevant proximal and distal antecedents of individual career management. Organisational career management was introduced by differentiating and comparing common stereotypes and empirical findings on age-related differences at work. Having considered differences in cognitive abilities, physical capabilities and health, socio-emotional and self-regulation skills, work motivation, and work performance, we outlined evidence-based career management strategies and practices for human resource management linking individuals' interests, strengths, and potentials to organisational functioning. Based on the literature review, we provided future research directions. As a result, we conclude that career management over the life-span is not a one-way street but a dynamic set of opportunities for both individuals and organisations to maximise their interests in times of global population aging.

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Age Diversity and Leadership: Enacting and Developing Leadership for All Ages

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Introduction

Globally, the workforce is changing. By 2050, the number of people over the age of 60 around the world is estimated to be over 21.1 per cent (United Nations 2013). These aging populations, coupled with increasing national retirement ages and decreasing retirement benefits, are creating a new challenge for organizational leaders as employees continue working well into what was once considered retirement age (The Economist 2014). Labor participation for those aged 65 and older totaled 8 per cent in developed regions and 31 per cent in developing regions; this participation in developed countries is expected to continue to grow up to 20 per cent by 2020 (United Nations 2013).

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The increasing percentage of these older workers is occurring due to many factors: a continued economic downturn, small growth in retirement benefits, and a shift away from defined benefit plans that guarantee lifetime retirement payments, the increased vitality of senior citizens, decreases in infectious diseases, and changes in employment structures that allow for alternative work schedules (The Economist 2014; Kulik et al. 2014; United Nations 2013). It is clear that an increasing number of aging workers are interested in continued organizational membership past the traditional retirement date, either due to economic needs or for the sense of belonging they feel to an organization or a career field.

Unfortunately, those workers who intend to continue their labor force participation may encounter opposition. Research into stereotyping across cultures offers evidence that older workers are perceived as less willing to change and not a desirable population for hiring into the organization (Chiu et al. 2001) and less willing to undergo additional training and development (Ng and Feldman 2012). However, a meta-analysis of such stereotypes found that except for training and development, the research does not support many of the other stereotypes, showing that age is not a significant negative predictor of motivation, adaptability, trust in others, health, or work–family imbalance (Ng and Feldman 2012). Changing the prevalence of these stereotypes is a significant undertaking for a firm’s leadership.

These realities, along with different job attitudes based upon one’s generation, create a challenge for organizational leaders (Kowske et al. 2010). The goal of this chapter is to highlight an adult development approach toward managing employees and oneself throughout the life span. First, we detail issues related to leading a diverse workforce, we then explore how an individual develops as a leader across the life span in three areas: knowledge, skills, abilities and values, personal identity, and wisdom, as well as successful aging processes (selection–optimization–compensation [SOC]; Baltes 1997). Finally, we offer recommendations for leading such diverse organizational populations.

Leading Age Diversity

Leadership has been defined as “behaviour that gives purpose, meaning, and guidance to collectivities by articulating a collective vision that appeals to ideological values, motives, and self-perceptions of followers” (House 1995: 413). As such, it is important to identify the values, motives, and self-perceptions of followers, especially those relevant to age diversity. The challenge associated with leading an age diverse workforce is not new; management has been pondering how to deal with the “*older, less productive*” (emphasis added) worker

since the early 1900s (Taylor 1911). The quote also highlights the long history of age-related stereotypes regarding the productivity of older workers. We summarize research on potential age-related differences in values and motives across various ages in leading a diverse workforce by considering both age-related maturation and generational differences, as well as discussing ways leaders can promote successful aging. In doing so, we attempt to clarify differences supported by theory and research evidence and those primarily based on perceptions or stereotypes.

Understanding Age-Related Differences in Values and Motivations

Carstensen's theory of socio-emotional selectivity (Carstensen 1993, 1995) suggests that as an individual ages, goals are reorganized as perception of time changes. In short, when people feel time is unlimited (generally when individuals are young), they are more likely to focus on broadening and future-oriented goals, such as knowledge acquisition, career planning, and expanding social networks. Alternatively, when individuals feel time is running out (generally as they age), they are more likely to focus on present-oriented goals, such as seeking emotionally gratifying interactions with social partners. In other words, when time is perceived as unlimited, knowledge-related goals are pursued; however, when time is perceived as limited, emotion-based goals are pursued. A study conducted by James et al. (2011) provides empirical evidence that motives change as employees age. They found differences in drivers of work engagement as employees aged. Whereas the older employees' engagement was affected by supervisor support and recognition, engagement of the youngest employees was predicted by career development and promotion opportunities within the organization. The positive relationship between age and many job attitudes, such as job satisfaction and job involvement, has been explained through this theory (Ng and Feldman 2010). Further, socio-emotional selectivity theory suggests that as people age, they become more selective by narrowing their social networks to devote more emotional resources to fewer relationships with close friends and family. Thus, beginning in early adulthood and increasing with age, individuals selectively reduce their social interaction but develop stronger emotional closeness to a chosen few significant others (Carstensen 1992). Priority is shifted from developing new relationships to maintaining already established close relationships. It should be noted that it is not aging, per se, that creates this shift but rather the salience of time limitations (Carstensen et al. 1999). As such, socio-emotional theory would suggest younger employees would find future-oriented goals,

such as knowledge acquisition and career planning, as more meaningful. Alternatively, older individuals might find relational-focused events with close co-workers as more meaningful.

Indeed, evidence for this hypothesis is demonstrated in a study conducted by Lang and Carstensen (2002), in which 480 participants completed an activity sorting cards based on goal priority and partner preference. Goal prioritization varied by age, in which older participants prioritized emotional and meaningful goals and younger participants prioritized instrumental and knowledge-based goals. A recent meta-analysis examined the relationship between age and work-relative motives (Kooij et al. 2011). As predicted by socio-emotional selectivity theory (Carstensen 1992), there was a negative relationship between age and growth-oriented motivation; however, the positive relationship between social motives was only found for some populations, such as white-collar workers. Additionally, the results indicated a positive relationship between intrinsic motivation and age and a negative relationship between age and extrinsic motivation. Thus, it appears that as individuals age, their motivation for work stems more from intrinsic aspects of the work and less from extrinsic rewards.

Likewise, leaving a lasting impact may serve as an important motivating factor for leaders as they age. Legacy beliefs refer to “individuals’ convictions about whether they and their actions will be remembered, have an enduring influence, and leave something behind after death” (Zacher et al. 2011a, b: 44). Such beliefs were found to relate to more active and effective leadership behaviors (transformational and transactional) for older professors than for younger professors. The authors suggest that younger leaders may be motivated for other factors such as career progression or achievement, whereas older leaders are motivated to maintain high-quality leadership behaviors in order to leave a lasting legacy. Furthermore, as leaders age, their style of leadership may be driven by generativity, that is, actions that develop and guide members of a younger generation. Empirical evidence suggests that when aging leaders are high in generativity, they develop higher quality relationships with followers and that followers are more satisfied with them as supervisors (Zacher et al. 2011a, b).

Examining Generational Differences in Values and Motivations

In addition to research on changes that may occur through maturation and development across the life span, research into generational cohort differences focuses on differences due largely to social environmental factors, in which particular groups of individuals were born and developed. Such factors may

include major events such as war or recession, major shifts in demography or technology, or influence of key heroes or leaders. Some research on generational differences in the workforce has suggested cohort differences with regard to values, desires, and work styles. Although there is some disagreement with regard to the specific dates in which generations fall, generally speaking, “today’s workforce consists of individuals from four generations: the Silent Generation (born 1925–1945), the Baby Boomers (Boomers; born 1946–1964), Generation X (GenX; born 1965–1981), and Generation Me (GenMe, also known as GenY, Millennials, nGen, and iGen; born 1982–1999)” (Twenge et al. 2010: 1118). Current generational theories tend to compare generations just entering the workforce, often referred to as Millennials, who were born in the early 1980s and whose lives were marked with a connection to technology and a prioritization of lifelong learning and meaningful work. They tend to value leisure time more than their predecessors and have a lower work centrality than Baby Boomers (Twenge et al. 2010). Also, this generation places a stronger value on extrinsic rewards than Baby Boomers, and some would argue this reflects a sense of entitlement characteristic of this generation.

Generational differences have also been identified with regard to perceptions of ideal leadership. For example, Sessa et al. (2007) found evidence of both similarities and differences in what attributes and behaviors they value in leaders and what styles they prefer as leaders. Specifically, whereas all cohorts valued honesty, knowledge about core functions of the organization, listening, and helping others achieve, there were differences among cohorts. For example, Millennials valued such attributes as focus and optimism more highly and such attributes as delegation and big-picture orientation less than other generations. Additionally, they suggest the overall picture of their study results suggests “that leaders in the older generations bring a calm, considered approach that draws on the skills and abilities of others. Leaders in the younger generations bring an energizing presence; they are focused on attaining short-term results; and they are more self-focused” (p. 69). However, the authors do note that these differences are not as drastic as they are presented in popular press and should not be treated as absolute. Another study found a disconnect between actual generational differences and perceived differences (Lester et al. 2012). By asking members of each generation what they value and what they believe other generations value among 15 work-related values, Lester et al. found that misconceptions among the generational groups as they perceive the other generations along each of the 15 values. As an example, Millennials perceive Baby Boomers as valuing formal authority more than they actually do. These misplaced perceptions may give further evidence and explanation for the tendency to overstate generational differences.

There is strong evidence to suggest that generational differences play a much smaller role than popular press would suggest. For example, a meta-analysis of generational differences in work styles (Costanza et al. 2012) found very little evidence of any meaningful pattern in generational differences and that where differences were found, the effect size was small to moderate at best. Specifically, the strongest relationships were found with regard to job satisfaction, commitment, and turnover intentions, with older generations slightly more satisfied and less likely to turnover (with an undiscernible pattern in commitment). The authors suggest that these findings are likely to be confounded with chronological age.

Promoting Successful Aging in the Workplace

When leading a diverse workforce in terms of age, helping people to achieve successful aging at work is within the scope of leadership. While there is some debate about specifically what successful aging at work encompasses, many would argue it involves a positive balance between the resources available to the individuals and the constraints they face. Robson et al. (2006) identified five important domains for successful aging in the workplace, including (1) adaptability and health, (2) positive relationships, (3) occupational growth, (4) personal security, and (5) continued focus and achievement of personal goals. These five areas represent an integration of physical, social, psychological, and cognitive components as well as both intrinsic and extrinsic factors. Zacher (2015) suggests that it involves a positive deviation from the average trajectory of various work outcomes over time. Therefore, leadership efforts to promote successful aging are directly linked to promoting organizational performance. In other words, considering successful aging makes very good business sense.

As leaders have a significant influence on employees' work experiences and well-being as well as their subjective perceptions of the workplace (Arnold et al. 2007; Perry et al. 2010), leader behaviors may influence employees' experience of successful aging in the areas mentioned above. Some researchers have suggested this can be done through initiatives that improve the work experience for older and younger workers alike, including enriching jobs, building autonomy, and skill variety, and suggest the effects might be even stronger for older workers (Truxillo et al. 2012). Further, building tasks that draw from crystallized intelligence rather than fluid intelligence may promote aging more successfully. Whereas fluid intelligence may peak around age 25 or so, crystallized intelligence may continue to grow at least until age 60 and beyond (Kanfer and Ackerman 2004). As such, building in tasks that draw

from knowledge and judgment based on experience rather than rapid processing of quickly changing information may be better for both older employees and the workplaces that employ them (Zacher 2015). Likewise, drawing from the acquired experience and competencies of older workers can be a competitive advantage for organizations by providing flexibility, autonomy, and supporting job crafting of older workers to allow them to redesign jobs to suit their needs and abilities (Truxillo et al. 2012).

Additionally, perceptions of future opportunities may be especially relevant when considering successful aging at work (Zacher and Frese 2011) and may likewise be important in leading an age diverse workforce. The authors argue that bringing a focus to opportunities is an appropriate criterion for successful aging at work as it is age-sensitive and is a positively balanced variable that considers a healthy optimism within the constraints an individual may experience. Perceptions of opportunities at work reflect how individuals see goals, opportunities, and possibilities for development, growth, and advancement in their future work. Although there is some evidence that the importance of occupational growth might decline slightly as individuals age (Robson et al. 2006), it is still at least moderately important for determining successful aging at work. Such perceptions may decrease as individuals internalize negative stereotypes associated with aging or personally experience any age-related challenges or decline. Additionally, there is evidence that individuals do receive less support for leading and development as they age (Sterns and Subich 2002), which may perpetuate such feelings.

Taking together theory and empirical findings, there is some research to suggest changes in values, motivation, and ability across the life span, especially regarding a movement toward emotion-based motivations (Carstensen 1992) and building of crystallized intelligence (Kanfer and Ackerman 2004). There is scant evidence to suggest generational difference with regard to these factors, and of those that are supported, most can be explained by life span changes (Costanza et al. 2012). However, it is very important to note that there is much greater variability in motivation and work performance within age groups than between age groups and likewise within generations than across generations. Likewise, there is evidence that many good leadership practices, especially as they relate to job design, might be beneficial for all employees, younger and older alike (Truxillo et al. 2012).

Life Span Approach to Leader Development

When considering issues of age diversity, it is important not to forget that leaders also experience the diversity of age. Unlike other dimensions of

diversity that are generally static through our lives such as gender or nationality, age is dynamic. When considering age diversity and leadership, it is also important to discuss how leadership competence, values, attitudes, identity, and behaviors develop through the life span. Leader development theories are just beginning to address the importance of a life span approach to development, drawing from theories of adult development (Day et al. 2014). These connections have been quite fruitful in advancing leader development theory. For example, integrative leader development theory (Day et al. 2009a, b) suggests that the development of leadership competence ultimately takes place within the context of deeper-level adult developmental processes. One reason the adult development literature is of particular relevance is that it takes a holistic approach considering lifelong individual development. Adult development considers development within and across life domains: through age-related maturation that is independent of domain as well as developmental experiences that occur inside or outside of the workplace. Furthermore, it presents development as a non-linear, multidimensional, multifunctional, and dynamic process of maximizing gains and minimizing losses. Drawing on the adult development literature, we can uncover both important content areas of development and processes that support these content areas.

One question that begs an answer when considering leader development across the life span is “what develops?” In answering this question, Day et al. (2009a, b) look to the adult development literature which suggests three primary areas in which adults continue to develop across the life span: identity, moral development, and epistemic cognition, which refers to an individual’s thoughts about the nature of knowledge. In applying these three areas, we discuss leader development across the life span in terms of (1) leader’s knowledge, skills, and abilities, (2) identity, and (3) wisdom. In doing so, we highlight the influence of development in these areas on leading others. We then discuss how leaders can develop through the SOC processes (Baltes 1997), which was originally developed as meta-model of successful aging.

Leader’s Knowledge, Skills, and Abilities (KSAs)

Because so much of the development of knowledge, skills, and abilities relevant to leadership centers on the accumulation of experiences and deliberate leadership practice, it follows that KSAs may reach different levels of development throughout the life span. For instance, research shows that skill mastery requires about 10,000 hours of deliberate practice (Ericsson et al. 1993). These opportunities for practice may facilitate faster progress from

the controlled and effortful processing required in early skills acquisition to automatic processing that occurs when skills are more fully developed (Kanfer and Ackerman 1989). However, other KSAs may diminish at points during the life span (Kanfer and Ackerman 2004). When considering the diversity of age in light of leadership development, there is a unique perspective that must be taken since age diversity is felt by individuals throughout their career and organizations experience age diversity among their leaders. Therefore, we consider here how individuals may understand age diversity in their own development as well as how they approach developing others at various life stages.

Leadership *knowledge* broadly pertains to information and facts relevant to leadership and the domain in which the leader operates. “Leaders need to be able to retrieve information that is relevant to leadership decisions (memory) and to analyze and evaluate different courses of action, whether proposed by themselves or by others (analysis)” (Sternberg 2007: 37). Leadership *skills* can manifest at various skill levels (novice, intermediate, and expert) in six skill domains, which include: (1) task, (2) emotional, (3) social, (4) identity level, (5) meta-monitoring, and (6) value orientation (Lord and Hall 2005). Finally, leadership *abilities* are the behaviors and actions that a leader is capable of performing. It may be thought of as a behavioral repertoire (Lawrence et al. 2009: 89). Taken together, we know that certain KSAs require more attention to learn at early phases of life and become more automatic later in life, allowing for attentional resource allocation to more expert-level KSA acquisition (Kanfer and Ackerman 1989; Lord and Hall 2005). Similarly, we also know that certain categories of KSAs are more relevant to different organizational levels, which may overlap with different life stages (Mumford et al. 2007). For example, cognitive, interpersonal, business, and strategic KSAs are required at different organizational levels. At senior levels, KSAs in the strategic category become more important while cognitive KSAs are more critical at junior levels. Leadership skills can develop with deliberate practice and “usually involve proactive behaviours in which individuals attempt leadership” (Lord and Hall 2005: 596). Therefore, when deliberately practicing leadership KSAs for self-development, one may need to practice different KSAs depending on their life stage, as well as to have patience during the early career experiences, in order to cycle through novice stages of leadership, through intermediate during midlife stages, and into expert leadership KSAs, most likely during later stages of the life span. Each of these stages requires different KSAs. While self-development requires self-awareness of life stage and organizational-level requirements, developing the leader KSAs of others requires mentoring appropriately according to the life stage of protégés or emerging leaders. Leaders may set goals or give work assignments that create deliberate practice

for certain KSAs (cognitive) that accelerate the movement from novice to intermediate and intermediate to expert. A leader may also provide coaching regarding the six domains of leader KSAs, as task, emotional, social, identity level (see identity below), meta-monitoring, and value orientation (see wisdom below) may vary throughout the life span (Lord and Hall 2005). Expert leaders may provide valuable guidance to intermediate and novice leaders as they develop KSAs in these six domains.

Although it is tempting to assume a linear relationship between age and leader KSA development from novice to expert, Kanfer and Ackerman (2004) summarize four distinct patterns of development across the life span that challenges the notion of linearity between age and leader expertise: loss, growth, reorganization, and exchange. Typically, individuals experience some gradual decline (loss) in fluid intelligence and a gradual gain (growth) in crystallized intelligence as they age. The second two patterns, reorganization and exchange, are more appropriate to understanding how employees may experience meaning differently across the life span. Exchange refers to age-related changes in motivation, needs, or behavioral tendencies. Lawrence et al. (2009) suggested that leaders must possess a complex range of often competing behaviors that they may apply according to the situation. Using the competing values framework, they validated 12 behaviors that fell into quadrants of collaborate, control, create, and compete. These were related to overall performance and ability to lead change. “The link between behavioural repertoire and leader effectiveness represents the proposition that the more leadership roles leaders can perform, the more likely it is that they will function effectively” (Hooijberg et al. 1997: 376). Further, leader behavioral repertoires often need to encompass seemingly conflicting behaviors. For instance, leadership behaviors such as developing followers, encouraging participation, and showing individual concern and monitoring, coordinating, and regulating are also important in a leader behavioral repertoire (Lawrence et al. 2009). Within the context of age diversity, a broader behavioral repertoire allows for successful enactment of leadership roles that require different behaviors across the life span.

Identity

The second area of development we focus on is that of identity. The notion of identity has received growing attention as a critical factor relating to leadership effectiveness and development (Day and Harrison 2007). Identity affects what individuals pay attention to, shapes the goals individuals pursue, as well

as how they perceive themselves and others (Baumeister 1999; Day et al. 2009a, b). Identity-related issues begin in early life and carry through to late adulthood. One aspect of identity, a leader identity, refers to a sub-identity specific to leadership. Generally, a leader identity includes aspects of how much an individual views him or herself as a leader and also draws from one's own meaning of leadership. Komives et al. (2006) examined the development of a leader identity in college students, and suggest that a leader identity develops in awareness of leadership and a broadening view of what leadership is, which generally moves from a leader-centric approach to a more relational and process-based approach. Day and Harrison (2007) noted that as leaders develop, they gain a more complex understanding of themselves and develop more multifaceted individual, relational, and collective identities. Through a more inclusive understanding of leadership and a more collective view of self-as-leader, a developed leader identity may facilitate sensitivity toward the development of leadership in diverse groups.

Consideration of leader identity has implications for both leading others and developing oneself as a leader. For instance, strong evidence suggests that as people age, they tend to maintain a positive sense of self and are more comfortable with their own identities (Sneed and Whitbourne 2005); however, there is evidence that the primary focus of one's identity changes across the life span. Specifically, Conway and Holmes (2004) found that the most salient memories from various decades of one's life were closely related to Erikson's (1997) stages of development. An implication from this finding is that, for example, younger workers are likely to pursue identity-shaping goals related to getting recognition or esteem, mid-career workers are perhaps pursuing goals related to relationship building, and older workers are possibly seeking to achieve goals that give a sense of having lived a meaningful life. Given well-established support (e.g., Vancouver and Schmitt 1991) that leader-member and member-member goal congruence both have an impact on attitudinal and behavioral outcomes, the recognition that important goals are likely to differ by age group is potentially an important piece of information for the person who is leading an inter-generational team. Similarly, understanding that one's own goals are likely to change in somewhat predictable ways is a benefit for the leader as she manages her own development.

Wisdom

The third content area we focus on is of wisdom. Although wisdom has been defined in a number of ways, most definitions focus on a resource that helps

individuals negotiate complexity and challenges in life, directed toward the good for self and others. Wisdom involves action, reflection, affect, and knowledge (Bluck and Glück 2004). For example, wisdom has been defined as “excellence in mind and virtue; in the conduct and meaning of life; and as expert knowledge and judgement in the fundamental pragmatics of life” (Baltes and Staudinger 2000: 125). Wisdom is thought to develop throughout the life span and is a celebrated hallmark of older age illustrated through maxims such as “older and wiser.” Common knowledge would suggest that wisdom is accrued with experience. Unlike other “detrimental” theories or concepts of aging, there is little evidence that wisdom declines with age or experience. Some propose that leaders can develop wisdom at any age (Day et al. 2009a, b). Research suggests that wisdom-related knowledge is at least evident in adolescence and develops on a steep curve through adulthood (Pasupathi et al. 2001). In a study examining narratives of experienced wisdom, Bluck and Glück (2004) found that although adolescents were able to recount a story in which they demonstrated wisdom, their narratives were less elaborate and less likely to be framed in terms of life lessons. It has been suggested that wisdom is a relational accomplishment; that is, it emerges through relationships and interactions with others in which we are able to come to view others’ perspectives and pursue obligations to community, society, as well as organizational stakeholders (Yang 2011).

Although research on wisdom is plentiful in the development literature, it has only been applied to leadership in a few places. Wisdom plays a key feature in Sternberg’s (2003) model of leadership which integrates three key components of leadership: wisdom, intelligence, and creativity, synthesized. Within this framework, wisdom is the ability to utilize creativity and intelligence toward a common good by balancing one’s own and others’ interests in both the short and longer term by selecting and shaping the environment through the application of positive principles and values. Wise decision-making involves balancing self, other and institutional interests in both the short and long term, as well as consider other points of view (Sternberg 2003). A wise leader would recognize issues of injustice, individual differences in needs, and concerns. He or she would also handle such issues with care and respect being mindful of various stakeholder needs and perspectives.

McKenna et al. (2009) put forth five principles that define wise leadership. They argue that wise leaders (1) not only make careful observations and use principles of reason (2) but also allow for intuitive and subjective factors to enter into decision-making. Incorporating elements of moral development, wise leaders (3) value moral principles and virtuous outcomes. Additionally, (4) wise leaders formulate actions that are practical and concerned for all in

everyday living including both work and non-work domains. Finally, (5) wise leaders are articulate in the manner in which they convey their wise judgment and advice to others.

From these perspectives, wisdom is very relevant for appropriately managing age diversity. As a leader gains wisdom, he or she is better able to notice, attend to, and properly respond to differences in needs, motivations, and of a diverse follower group. He or she would be more sensitive to issues of age-related injustices and instances of age-related prejudice or discrimination. As wisdom is most appropriate when facing uncertainty or challenging situations (Bluck and Glück 2004), wise leadership might be more important when leading a diverse workforce into the future.

Selection–Optimization–Compensation

In addition, we focus on one process that has significant potential for both promoting leader development in the above three areas across the life span. The SOC (Baltes 1997) model is a leading meta-model in describing a general adaptive strategy of development across the lifespan. The SOC model is resource-based (Wiese et al. 2000), developmental (Baltes 1997), and appropriate in the context of understanding leader development (Mumford et al. 2007; Day et al. 2009a, b). Underlying the SOC meta-theory is the basic premise that resources are not infinite, and successful development happens as individuals make choices and adapt to changes as resources are more or less available (Wiese et al. 2000). Successful development promotes the increase of resources, maintenance of existing resources despite challenges, and effective coping with inevitable resource loss. At a basic level, the SOC model suggests that development occurs as a function of successful interactions and adaptations between an individual and his or her encountered environments, and describes ways of capitalizing on gains and minimizing losses. Development occurs through adaptations and changes that are required to choose among various competing goals (selection), to draw from strengths and resources (optimization) and to overcome deficiencies (compensation).

Selection addresses the processes involved in structuring and deciding on goals. Selection may involve decisions regarding the kinds of leadership roles individuals take on, the kinds of situations they will seek out, how they might put themselves forward as leaders, the goals for the team, and so on. It is important to note that adaptive selection may involve choosing not to pursue certain goals or even lowering standards when necessary (Baltes 1997). Optimization involves the application of strategies and processes in goal

pursuit such as energy and time investment as well as persistence. Adaptive optimization strategies may involve the balance between time investment across domains as well as engaging in necessary periods of rest and recovery. Finally, compensation refers to strategies involved in counteracting anticipated or actual loss of resources. Most examples of compensation involve losses of physical or mental functioning due to aging, other types of losses can be expected in leadership as well in the areas of funding, social support, material resources, and even motivation. Compensation can occur across domains and may be a useful strategy in managing failures as well (Weise et al. 2000).

Although these processes begin in the earliest stages of life and carry on until the latest stages (Baltes 1997), successful aging and development occur as individuals become better at orchestrating these three processes. Growth in SOC processes underlies adult development and high levels of SOC support leader development. Novel and challenging experiences contribute to the development of new levels and profiles of SOC processes (Freund and Baltes 2002). SOC processes are particularly effective when resources are limited. As the use of SOC processes has been linked to perceptions of continued possibilities for development and growth in the workplace, especially among older employees in low-complexity jobs (Zacher and Frese 2011).

Recommendations

After identifying a number of issues relating to both leading age diversity and developing as a leader across the life span, we now provide recommendations for successfully navigating the waters of leadership and age from both the perspectives.

1. *Continue to develop as a leader.* As highlighted above, as leaders develop their own KSAs, identity, wisdom, and profile of SOC processes, they will become better able to lead followers of any age group. KSAs provide a leader with a repertoire of behaviors upon which to draw when considering individual needs of followers across various age groups. A well-developed leader identity provides a broad and inclusive understanding of leadership and a focus on the collective. A wise leader is more sensitive to age-related injustices and better able to respond to diverse needs. Finally, a leader who is better able to negotiate SOC processes will be able to continue as an expert leader into later years.

It should be noted that each of these content areas and processes support one another. As a leader identity develops, the leader is more likely to seek

out additional experiences to engage in leadership behaviors. These experiences may provide an opportunity to further develop leadership skills, behaviors, and motivations. The development of a leader identity and leadership effectiveness has been described through a similar spiral process (Day et al. 2009a, b), with some longitudinal evidence supporting a positive within-person effect of leader identity and other ratings of leadership effectiveness (Day and Sin 2011). Further, wisdom forms as “moral capacity and sophisticated reflective judgment ability become aligned with emerging expertise (i.e., leadership competencies)” (Day et al. 2009a, b: 255). Finally, SOC processes serve a foundational role in competence development and identity and self-regulation processes and can accelerate the rate at which skills are integrated into competencies and promote effective self-regulation (Day et al. 2009a, b).

2. *Develop leadership in followers.* One hallmark of effective leadership is that the leader develops the followers (Bass and Stogdill 1990). When considering age diversity, support and encouragement for development of followers, regardless of age, become even more important. The tone the supervisor sets is central in shaping attitudes toward development, especially for older workers. Because the leader is a representative of the organization in the day-to-day experience of work, support for training and development given by supervisors signifies the level of support from the organization at large. Further, the supervisor often is the gatekeeper of information on resources such as policies and opportunities for the employee (Hammond et al. 2015). Indeed, research has indicated that the often-cited negative relationship between age and willingness to engage in training and development was only present when the supervisors were perceived to be unsupportive of training and development or held negative beliefs themselves that older workers avoid engaging in learning (Van Vianen et al. 2011). In other words, supervisors themselves are instrumental in perpetuating the perception and reality that older workers are not interested in training and development. They do this through being unsupportive and arguably by creating a self-fulfilling prophecy that older workers fail to engage in training and development. Therefore, the message that the leader sends is hugely important for successful aging at work.
3. *Become educated on aging and diversity.* In order to promote successful aging in the workplace, to encourage positive relationships among employees of all ages, and to maintain an engaged workforce, leaders need to be informed about aging. Although it would not likely be possible for leaders to become “aging experts,” it does behoove leaders to understand basics about life span development. In addition to understanding what successful

aging looks like, it is especially important for leaders to be educated about truth behind common stereotypes regarding aging. As mentioned above, one of the most prevalent stereotypes about older workers concerns a perceived lack of interest in training and development, or even worse, an inability to learn new things. This belief is often held as older workers are perceived to be “checked-out” or counting the days until retirement (James et al. 2011). However, research indicates that this is simply not the case. Mature workers have been found to display more loyalty and are more orientated toward an organization (D'Amato and Herzfeldt 2008) and are more engaged than their younger counterparts (James et al. 2011). Just as the supervisor serves a key role in promoting an interest in development, supervisor support was the key predictor of engagement for older workers (James et al. 2011). Other stereotypes also fail to hold true as age is not a significant negative predictor of motivation, adaptability, trust in others, health, or work–family conflict (Ng and Feldman 2012).

Furthermore, the attitude with which the leader views diversity is very important. For example, a focus on the assets of older workers such as their accumulated wisdom, experience, and networks can set a tone for the team. Providing training and development for teams, departments, and organizations regarding diversity and positive diversity beliefs will provide an awareness of strengths of different age groups (Homan et al. 2007). Diversity training programs are especially useful when considered in an integrative manner (Bezrukova et al. 2012).

4. *Focus on individualized needs.* It is important to remember that older workers are a vastly diverse population in themselves with different needs, different values, and a different experience of the aging process (Robson et al. 2006). The same can be said about younger workers or middle-aged workers. As such, when considering leading for age diversity, there is much more than “age” on the table. Basic consideration of individual needs is appropriate. Most leadership theories have argued against a “one-size-fits-all” approach to effective leadership since early contingency theories. For example, one dimension of transformational leadership focuses on individual consideration for effective leadership which includes attending to followers’ personal needs, acting as an appropriate mentor or coach, and listening to followers (Avolio and Bass 1995).

This type of individualized consideration can be manifest not only in leader–follower relations but also at higher levels in organizations. Flexible HRM policies can increase younger worker engagement while allowing older workers to maintain their job performance at reduced hours (Bal and

De Lange 2015). The use of idiosyncratic deals (I-deals) may be especially useful for maintaining motivation to work into older age, especially when paired with a positive work climate (Bal et al. 2012). I-deals are defined as “voluntary, personalized agreements of a nonstandard nature negotiated between individual employees and their employers regarding terms that benefit each party” (Rousseau et al. 2006: 978). Most often I-deals centre on flexibility in work scheduling or in developmental opportunities offered to employees. I-deals may be especially attractive for motivating employees to work beyond typical retirement ages as it both provides them with opportunities to balance work and non-work interests, negotiate changes to work tasks, and also shows the employee that he or she is valued (Bal et al. 2012). However, these benefits are likely to be appreciated when extended to employees of any age.

Future Research Directions

In addition to the practical recommendations based on our exploration of the interface of age and leadership, we also suggest future research directions that address appropriate methodologies to properly capture the dynamic complexity of age and leadership and potential interventions to test the recommendations we set forth in this chapter. Because age is a dynamic diversity construct, research that explores its effect on both the act of leading (how to effectively lead different age groups during different life stages) and developing leadership is best served using longitudinal methods. Indeed, the dynamic nature of age diversity can only be partially understood with cross-sectional data. Furthermore, leadership development also encapsulates a long-term approach, as cognitive constructs such as identity and wisdom develop slowly over a lifetime of experiences. Again, such constructs are best served by using longitudinal study designs. Finally, we have noted that values and work motivations of leaders and followers shift during life stages and therefore suggest that future research may be best served by also considering how leaders develop outside of work as they mature, thus taking a multi-domain approach to leadership development (Hammond et al. 2016). Below we address longitudinal studies, interventions, and potential theoretical models that could be applied to age diversity and leadership research to advance our understanding of this complex dynamic.

First, in consideration of longitudinal research and building on research that suggests that certain leadership behaviors decline (i.e., transformational and transactional; Zacher et al. 2011a, b) or leader motivations shift

(i.e., instrumental versus emotionally meaningful goal prioritization; Lang and Carstensen 2002) as leaders age, we recommend, therefore, research that captures and models the extent of this decline or the nature of this shift. It may be that longitudinal studies may find curvilinear effects of such leader constructs as leader success, effectiveness, and leader motivations. Potentially more interesting, however, is to use longitudinal studies to observe the trajectory of leader development through the life span. By exploring the leader identity construct, longitudinal research may not only observe shifts in leader identity but also understand the so-called replacement motivations as leaders age. If certain motivations to lead shift during the life span to impact leader identity, longitudinal research might answer what shifts, when it shifts, and how it shifts.

Second, we suggest that interventions can also aid in uncovering the intersection of leader development and aging. For example, future research might address such interesting questions as how becoming educated on aging and diversity might affect the interaction of leaders with followers of different ages. Likewise, research might examine the effectiveness of interventions geared to reduce age-related stereotypes not simply in reducing their prevalence but also for leadership effectiveness more broadly. Additionally, future research might consider how job crafting might take shifting motivations of leaders and followers into consideration to allow for more meaningful work environments (Truxillo et al. 2012). This could be considered not only in terms of how leaders foster job crafting while leading an age diverse workforce but also for the personal development of the leader through his or career. Similarly, further work investigating generativity and legacy beliefs across the leaders' career may be beneficial.

Finally, and drawing once again on changes in values and motivations, the intersection of leader development and aging might also be more clearly understood when considering development of leadership beyond the workplace, that is, using a multi-domain approach to understanding how leader identity develops (Hammond et al. 2016). Indeed, as leaders age, they may find meaningful social networks in a community and/or friends and family domain in addition to or instead of the work domain. A more integrated leader identity may provide opportunities to have different aging experiences at work than a splintered or leader identity that becomes compartmentalized and disconnected between the domains of work, family, and community. Such an approach to understanding leader development and aging may also aid in understanding how life events and experiences both inside and outside the workplace affect the development of leader competence during different time periods of life.

Conclusions

The leader's thoughts, attitudes, and behaviors have a great impact on the experience of employees across the life span in terms of both interacting with others and aging well at work. Our wish is that through consideration of a life span approach to enacting and developing leadership, the workplace can be made better for workers of all ages.

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