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Title: **The credibility gap: Age does matter**

Abstract:

A review of the literature about Australia's ageing workforce shows significant research into the changing demographics, and predictions of the need to employ more older workers to fill the ranks. Older workers are clearly valued by employers for their reliability, experience, and low turnover. A summary of this is provided. However, older workers still do not get hired. There is a credibility gap between what employers say they believe, and how they act. Reasons for this are posited, and suggestions made for further research.

The credibility gap: Age does matter

The context

Australia is an ageing country, and is already old by world standards (Australian Bureau of Statistics, 2000). Like other western countries, the average age of people in the workforce is increasing and people are generally living longer. In the 12 months to June 2001, the number of persons aged 65 years and over increased by 1.8%, to just over 2.4 million in total, and the median age of the Australian population has increased by 5.8 years in the last 20 years, from 29.6 years in June 1981 to 35.4 years in June 2001. This continues the trend of a rapid increase in the elderly population, which has grown by 156% over the last twenty years, compared to a total population growth of 30% over the same period (Australian Bureau of Statistics, 2002). As further evidence of Australia's ageing workforce, in August 1996, 26.1 per cent of the Australian civilian population were "older" whereas that percentage in 1966 had been 24 per cent (Australian Bureau of Statistics, 1996).

The age varies at which workers' cohorts, their employers and their younger and older colleagues consider them to be "older". For example in Australia, sixty-two per cent of employers considered that 55 year-old employees were older workers (compared with thirty-two per cent of employees) (Steinberg, et al. 1998). Steinberg, et al. (1998) also found that the age at which a worker is called "older" varies with company size, whether the respondent is an employer or an employee, and the relative age of the respondent. Seven per cent of employers classified "older" workers as those 36-40 years of age, while a further fifteen per cent were classified as "older" who were 41-45 years of age (Steinberg, et al., 1998). In comparison, UK research found that the mean age of those considered "older" by women was 48 years, and by men was 51 years (McGoldrick and Arrowsmith, 2001). Encel (2001) however, argued that in Australia the most commonly accepted age for being "older" was 45.

There has been considerable discussion on the implications of Australia's ageing population (Australian Bureau of Statistics, 1999, Australian Bureau of Statistics, 2000, Bishop, 1999, CATO Institute, 1998, Institute of Actuaries of Australia, 2000), the majority of which makes reference to the problematic nature of growing age dependency. The Australian Bureau of Statistics (ABS) forecasts that the proportion of Australia's population over the age of 65 years will double by 2051 and the 15 to 64 year old cohort, those being relied upon to fund the general taxation reserve from which welfare payments are made, is projected to decline by 7 per cent over the same period (Australian Bureau of Statistics, 2000). Australia's ageing profile is a consequence of the post World War II baby boom, declining post-war birth rates, the immigration of people of working age, as well as increased longevity (ACIL Consulting, 2000). The demographics of Australia's over 65 years group are estimated to rise from 12 per cent of the population in 2000 to 25 per cent in 2051, with the median age rising from 34 years today to around 40 years in 2021 and 44 years in 2051 (ACIL Consulting, 2000). The repercussions of this are that the dependency ratio (the ratio of people aged 65 and older relative to those of working age, for example, 20 to 64) will grow to a level that the wealth transferred between the employees and the retirees will be insufficient. "For the world as a whole, this ratio is projected to more than double between 2000 and 2050, increasing from 12.8 to 28.9 per hundred" (AARP, 2002: 3). Clearly, this is not a positive direction for Australia's welfare system, and employing more older workers would help to reduce this ratio.

The Australian "baby boomer" generation (those born in Australia between 1945 and 1960) has now progressed through to the brink of retirement, and in 10 or so years will create a "bubble" of 65 year olds, and begin roughly ten years of "the highest rate of growth in the over 65 age group" (ACIL Consulting, 2000: 9). In 2002, the oldest of these boomers are now 57 years of age, and even the youngest are 42. These boomers were well-educated young job entrants and supplied more than sufficient workers. However as Patrickson, among other writers, has identified, there is a shortage of skills in the labour force, and continued early retirement will mean the situation will deteriorate (AARP, 2002, ACIL Consulting, 2000, Australian Bureau of Statistics, 2000, Drucker, 2001, Hartmann, 1998, Kendig and Duckett, 2001, Patrickson and Hartmann, 1995, Patrickson, 2001). This was identified as early as 1991 by Foot and Venne (1991) who found that human resource managers in North America were experiencing problems in recruiting for entry-level positions.

In Australia it is not yet apparent that the impact of our ageing population has been realised by employers. Like other countries, Australia's economic recession reduced the demand for labour in general, and thus organisations have not yet found difficulty hiring from the young and other casuals labour market. Also, the actual baby boomer "bulge" has not quite yet arrived. Indeed, even the Australian Bureau of Statistics does not commonly publish statistics specifically about older workers, though it commonly differentiates for those aged 15-19 years, and then combines all workers 20 years and older. The problems of the ageing population would be expected to be worst around 2010-2015, when the oldest third of the boomers would be 65-70, one third would be 60-65, two-thirds would be 55-60, and even the youngest would be old enough for early retirement at 50-55. In other words, organisations need to prepare for managing an older workforce.

The increased number of years of life expectancy possibly due to the increasing medical advances, interest in self-management of diet and exercise and changing to healthier lifestyles, means that this retiring generation will add to an already expanding aged proportion of the population. For each working person in the future, there will be a greater proportion of aged people to provide for. In other words, there is (or will be) a labour shortage imperative to retain or re-employ older workers. The population projections for the future mean that the current number of jobs will not be able to be filled, because "in every single developed country, the birth rate is now well below the replacement rate of 2.2 live births per woman of reproductive age" (Drucker, 2001: 3). "They are expected to stay low due to the decline in infant and child mortality, the rising costs of rearing children, and improvements in the status and economic opportunities for women" (AARP, 2002: 2). Steinberg, Walley, Tyman and Donald (1998) argued "clearly the most effective action is preventative - retaining older workers in their jobs. Failing that, re-employment becomes crucial" (1998: 60).

It appears an easy situation to resolve. On the one hand, there is a looming labour shortage, while at the same time, more older people possibly want/need work. Surely a balance can be reached to meet both sets of needs. If employers need workers, then why not choose older workers, unless perhaps they are not perceived as competent or valued as employees. The literature in the area of whether employers value older workers positively or negatively was reviewed for this reason. The dominant theme found in the literature was that older workers are positively viewed by employers. Many researchers have found positive perceptions from employers, or note that the common stereotypes concerning older workers are not supported (summarised in Table 1).

Table 1 about here

In comparison, some researchers have found negative perceptions from employers (for example, AARP, 1989, Encel, 1998, Encel, 2001, Kern, 1990, Min and Kleiner, 2001, O'Neill, 1998, Rearch Research, 1990, Rix, 1990, Steinberg et al., 1998, Walker, 1997, Taylor and Walker, 1994) but these appear to be in the minority and limited to particular aspects of the job, rather than an assessment of overall performance. Others have found mixed reactions, citing both strengths and weaknesses of older workers (for example, Encel, 1998, Kern, 1990, Lyon and Pollard, 1997, OECD, 1994, Salthouse, 1994, Steinberg et al., 1998, Walley, cited in Steinberg, 1998).

One of the important issues about ageing and performance at work is the inaccuracy of predicting work performance based on age as the predominant indicator. Of course, not all individuals will perform at the same level or standard, nor will they "age" at the same rate. In other words, as a group, it is not clear whether work performance of older workers declines with age or not. As we all know from our own experience, some 65 year olds are "elderly" while others are healthy, sprightly and look younger than their years. "Although the effects of age can be determined for specific performances and the rank order of an individual can be assessed for any performance with respect to his age peers at any given time, the predictive value of such scores for future performance of individuals is very

low” (Dietz, 1980, cited in Shen and Kleiner, 2001: 26). Rix (1994) has criticised much of the older worker research, on the basis that older workers are individuals, and their performance is not standard according to age. In fact, she found that variability increases with age.

From the above table, one would be inclined to think that this translated into job opportunities for those same highly-valued workers. However, this is not the case. When it comes to recruiting in reality, research shows that employers prefer younger workers. It is widely recognised that if you are older and job searching, you will have greater difficulty in being hired. Walley (1994, cited in Steinberg, 1998) found that a mix of UK male and female 30 and 50 year-old human resource practitioners viewed younger applicants (aged 30) as more successful in securing employment than older applicants (aged 50). Younger applicants were perceived as significantly more trainable, more relocatable and more suitable for promotion, but older applicants were viewed as more mature, responsible, reliable, calm, stable, and organised. In other words, age did matter. Similarly, Laczko and Phillipson (1990, 1991) found that the experience of the majority of older workers was one of discrimination and not being selected for jobs. Itzen and Phillipson (1993) also found that there was a significant obstacle to older workers being employed – the negative attitudes of managers.

Supporting this, Drucker (2001) said, “today’s human resource managers still assume that the most desirable and least costly employees are young ones”, and that older workers have been “pushed into early retirement” to make room for the “younger people who are believed to cost less or to have more up-to-date skills” (2001: 21). The majority of Australian organisations have not realised the implications for them, and have “continued to reduce their older workforce and to disregard the advantages that these people may bring” (Hartmann, 1998: 10), and “despite the fact that research evidence has repeatedly indicated that older employees have particular strengths, the attitudes of people in many organisations remain negative” (Yearta and Warr, 1995: 29). In 1994, a study was undertaken of employers in Sydney, obtaining responses mostly from under-35 year-old human resource managers and personnel officers. Most respondents were actually resistant to the idea of hiring older employees (Falconer and Rothman, 1994, cited in Encel). Strangely enough, while ability or reliability and trust/loyalty were cited by employers as two of the most important characteristics needed by an employee for promotion or advancement (Steinberg et al., 1998), and while it has been found that older workers are stronger in these characteristics, employers still prefer younger workers. Therein lies the paradox, possibly made worse by Australia’s “youth culture”.

If older workers are really valued in such a positive light, why are they not being hired? Some obvious answers spring to mind, such as rates of pay (usually lower for young workers); the image of the job or organisation (for example, the youth image of McDonald’s in Australia); physical or practical reasons (a strong physical strength and presence required, for example, for a nightclub “bouncer”). However, these are likely to affect only a minimal number of jobs. One possible answer may be found in the problem of using the research findings in Table 1 to provide a solution to why older workers are apparently not being hired. Much of the contributing research has been undertaken to ascertain whether older workers are positively or negatively valued, and if so, for which abilities or dimensions. However, it is not evident from the research whether respondents were asked if this value was the same as they would place on an unknown applicant. Therefore, using the results from such research is possibly not applicable.

Another answer to why valued older workers are not hired might be that these workers are not really valued, but the research respondents provided socially desirable answers. When asked for comments about the value of older workers, it is “not nice”, nor politically correct, to say that such employees are slow, more expensive or inflexible, and even more so if the researcher asking the question is relatively older than the respondent. In other words, respondents to the research are influenced by the undesirability of criticising older workers, and this may have distorted the results. In addition, in Australia, where discrimination on the basis of age is illegal, many employers would be reluctant to divulge any practices of not hiring older workers, and thus would be forced to say they believed older workers to be worthwhile employees. If older workers were thought of as highly as suggested in

Table 1, it seems they should be able to find jobs. It appears, however, that there is a gap between what employers say they believe and how they act.

Thirdly, the respondents commented about older workers who were already employees, and therefore the respondent would usually have observed the older worker's performance. As a result, they were commenting about people they knew. In a hiring situation, many employers are faced with applicants who are strangers - about whose performance they know nothing. As with other disadvantaged groups, the associated stereotypes tend to be a barrier to employment, and experiences (or lack thereof) with members of that group will affect, either positively or negatively, the employer's inclination to recruit from that group. It appears that research is needed into the views of employers about the value of hiring older workers in the first place, not the value of current employees who happen to be "older". It may be that Table 1 findings are not appropriate to the issue of the potential employment of older workers.

Most of the research discovered by the author on the hiring of older workers was several years old, and hence there is the possibility that older workers are currently being hired, and that it is time to update the research. Further, the industries in which the research was conducted (and whether or not they are conducive to older workers), the particular jobs investigated, the relative ages of the researcher and respondent, may all potentially impact on the findings. Further research into these possibilities would be beneficial.

While the positive view of the value of older workers as employees dominates the literature, other findings are that employers are not translating what they say they believe into positive hiring decisions for older workers. As mentioned previously, there is a gap between what the research is indicating, and what is apparently happening. It is time that research was conducted into older workers and hiring practices. The selection policies and practices of an organisation are likely to impact the outcome of a hiring decision, and thus influence the take-up rate of older workers into the workforce. Issues of possible concern include the age differential between interviewer and applicant, the selection criteria used, the "measure" and definition of "competence", and the perception of the value of older workers in terms of their organisational fit, and other characteristics which are extraneous to the individual job itself, but for which they may be selected (such as maturity or stabilising influence).

Conclusion

The literature appears to indicate that employers value older workers as employees. Yet, they prefer to employ younger workers. Thus, there is an apparent gap between their stated beliefs and their actions. It is this gap that has been reviewed in this paper. Perhaps the explanation for this gap lies in the social desirability issue of doing research about older workers. After all, we will all join their ranks at some stage. Another explanation could be that research was based on employers' views of the value of older workers who are already in the workforce, and not those who are potential employees. That is, respondents were providing information about older workers they know, not possible older applicants they don't know, and whether the latter would be considered valuable employees. Therefore, the findings of older workers as valuable may not be useful to interpret predictions of the selection success of older workers.

There is limited research (Myers, 2001, Patrickson, 2001, Patrickson and Clarke, 2001) on the area of older workers themselves and their views about continuing or rejoining the workforce. However, if the demographers and statisticians are accurate forecasters, the swing of the pendulum towards demand for labour will create conditions in which employers will be forced to rethink their stereotypes of older workers, and to integrate the findings of a variety of researchers on the significant positive value of employing older workers. Even if employers have a gap in their credibility between reality and research, they will need to revisit the issue of managing an older workforce.

In view of the apparent uncertainty from the literature, there is a critical need to pursue research to yield information about the hiring practices and experiences of both employers and older workers, including workers both inside and outside the workforce.

Table 1: Strengths of older workers

| Dimension (in alpha order) | Author | Comments |
|--|---|--|
| Ability to handle more complex issues | Tabakoff & Skiffington, 2000 | |
| Able to be counted on in crisis situations | Steinberg et al, 1998 | |
| Accidents | <ul style="list-style-type: none"> • Rix, 1990 • Steinberg et al, 1998 • Taylor & Walker, 1994 | <i>Fewer accidents than younger workers.</i> |
| Accuracy | <ul style="list-style-type: none"> • Encel, 1998 • James, 2001 | <i>Accuracy increases with age. Older people make less mistakes.</i> |
| Attendance/ Low absenteeism | <ul style="list-style-type: none"> • Encel, 1998 • Gordon, 1995 • Rix, 1990 • Steinberg et al, 1998 • Tabakoff & Skeffington, 2000 | <i>Less absenteeism than younger workers. Over 55s have the lowest absenteeism of all age groups.</i> |
| Better able to carry out instructions | Encel, 2001 | |
| Better developed skills | Encel, 2001 | |
| Better qualified | Encel, 2001 | |
| Better quality job | <ul style="list-style-type: none"> • AARP, 1990 • Etcoff, 2001 • Gordon, 1995 • Humple & Lyons, 1983 • James, 2001 | <i>Rated by employers.</i> |
| Creativity | <ul style="list-style-type: none"> • Gordon, 1995 • Kaplan, 2001 | <i>Older workers put forth fewer ideas, but more ideas tend to have value. In solving problems.</i> |
| Commitment | <ul style="list-style-type: none"> • St-Armour, 2001 • Encel, 1998 • Kaplan, 2001 | <i>More committed to their organisations than younger workers.</i> |
| Experience/ have useful experience | <ul style="list-style-type: none"> • AARP, 1990 • Bell, 2001 • Encel, 1998; 2001 • James, 2001 • Lyon & Pollard, 1997 • Maule, Cliff & Taylor, 1996 • Tabakoff & Skiffington, 2000 | <i>Prized attribute in the real estate industry. Experience is a better predictor of job performance than age.</i> |
| Good learning capacity | Kern, 1990 | |

| | | |
|--------------------------------------|---|--|
| Honesty | Kaplan, 2001 | <i>Honesty with clients.</i> |
| Influence on younger workers | <ul style="list-style-type: none"> • Sinclair, 1998 • Steinberg et al, 1998 | <i>Valuable to careers of younger workers. Steadying influence.</i> |
| Job turnover | <ul style="list-style-type: none"> • Encel, 2001 • Gordon, 1995 • Steinberg et al, 1998 | <i>Older workers have lower job turnover.</i> |
| Judgement | AARP, 1990 | <i>Better judgements than younger workers.</i> |
| Knowledge | <ul style="list-style-type: none"> • Bell, 2001 • Encel, 1998 • James, 2001 • Kaplan, 2001 | |
| Knowledge of business cycles | Tabakoff & Skiffington, 2000 | |
| Knowledge of the Org structure | James, 2001 | |
| Lower turnover | Rix, 1990 | <i>Less likely to quit.</i> |
| Loyalty | <ul style="list-style-type: none"> • Bell, 2001 • Encel, 1998; 2001 • Humple & Lyons, 1983 • Lyon & Pollard, 1997 • Steinberg, et al. 1998 • Walker, 1997 | <i>In the real estate industry.</i> <i>The most frequently chosen quality for selection of older workers.</i> |
| Make better decisions | Etcoff, 2000 | <i>Rated by employers.</i> |
| Moral reasoning | Moberg, 2001 | <i>Moral reasoning and perspective-taking do not decline with age.</i> |
| Personal issues | Humple & Lyons, 1983 | <i>More important to the older worker.</i> |
| Positive attitude to work | <ul style="list-style-type: none"> • Gordon, 1995 • Lazarus & Lauer, 1985 | <i>More positive attitude than younger workers.</i> |
| Productivity | <ul style="list-style-type: none"> • Taylor & Walker, 1994 • Walker, 1997 | |
| Psychological insight for management | James, 2001 | |
| Punctuality | <ul style="list-style-type: none"> • Encel, 1998 • Gordon, 1995 | |
| Quality of work life | Humple & Lyons, 1983 | <i>More emphasis on quality of work life, not job itself.</i> |
| Reliability/ dependability | <ul style="list-style-type: none"> • Encel, 1998; 2001 • Etcoff, 2000 • St-Armour, 2001 • Steinberg, et al. 1998 • Tabakoff & Skeffington, 2000 | <i>Rated by employers. More reliable than younger workers.</i> |

| | | |
|----------------------------------|---|---|
| | <ul style="list-style-type: none"> • Taylor & Walker, 1994 • Walker, 1997 | |
| Sick Leave | Steinberg et al, 1998 | <i>Less sick leave than younger workers.</i> |
| Social issues | Humple & Lyons, 1983 | <i>More important to the older worker than younger worker.</i> |
| “Unconscious optimisation” | Encel, 1998 | <i>The ability to compensate for changes that impair performance appears to improve with age.</i> |
| Wisdom (required for management) | James, 2001 | |
| Work ethic | <ul style="list-style-type: none"> • Bell, 2001 • Humple & Lyons, 1983 • Lazarus & Lauer, 1985 | <i>Deeper sense of a fair day’s pay.</i> |

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