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The Oxford Handbook of Work and Aging

Edited by

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Walter C. Borman

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CHAPTER 16

Age Stereotypes and Workplace Age Discrimination

A Framework for Future Research

Richard A. Posthuma, María Fernanda Wagstaff, *and* Michael A. Campion

Abstract

This chapter analyzes the current state of research on the topic of age stereotypes and age discrimination in the workplace. Recognizing the growing importance of age stereotyping research as the workforces of many countries continue to grow older, this chapter defines and differentiates the important concepts used in this field of research (e.g., age stereotyping, ageism, age discrimination). Specific illustrations of age stereotyping are identified, and it is shown how these stereotypes can have negative impacts on both workers and their employers. The relationship between age stereotyping and age discrimination is discussed with reference to recent court cases. A meta-framework that provides guidance for future research is offered to enhance the coordinated growth of research in this field. Finally, specific directions for future research and best practices for organizations are identified.

Keywords: age stereotypes, age discrimination, older workers, aging

Introduction

There are growing concerns about the ability of the United States and other Western countries to remain competitive in the global marketplace. Jobs are often sent to other countries where products can be produced at a lower price because labor costs are cheaper. Therefore, in this globally competitive environment it is becoming increasingly important for countries to prevent the underuse of specific segments of their workforce that could occur because of unfounded assumptions, biases, or stereotypes that can marginalize some workers. Recent research has suggested that age-based discrimination may result in an underuse of older workers who have many productive years left in their working lives (Roscigno, Mong, Byron, & Tester, 2007). One reason for this is the tendency for employers to unfairly use age stereotypes that prevent older workers from being fully engaged in their organizations (Bjelland, Brayere, von Scharader, Houtenville, Ruiz-Quintanilla, & Webber, 2010; Older Workers, 2006). This loss of the most experienced and often highly qualified and talented workers can be a major factor behind the existence of unproductive and noncompetitive business organizations.

Moreover, during periods of downsizing, older workers are often the most susceptible to losing their jobs because of unfounded and erroneous beliefs about their work performance and future potential. A particularly insidious consequence of laying off older workers during periods of downsizing is that the negative stereotypes about older workers may make it particularly difficult for those workers to find another job.

In addition, it has been shown that there can be direct linkages between age stereotyping and unlawful age discrimination (e.g., *EEOC v. Town of Huntington*, 2008). To remedy these problems, employers need to do what they can to avoid the problem of age stereotyping in their workplace.

Despite the importance of this topic, there has been relatively little research on age stereotyping. Although aging affects everyone, there has been comparatively more research on race and gender

stereotypes. It could be that this paucity of age stereotyping research is due to the difference between age discrimination and other types of discrimination such as race and gender. Everyone has had the chance to be young and reap the benefits of being young, but everyone will eventually face age stereotyping as they get older (Manfredi & Vickers, 2009). By contrast, only certain subgroups in the workforce suffer race or gender discrimination. In fact, in some countries, the argument for a mandatory retirement age is that people should retire at some point to give younger people a chance to have access to the better jobs. Yet even this reasoning is flawed and may be based on unconscious biases against older workers. Certainly, there can be expanding job opportunities for all workers, older and younger, as an economy and a firm grows (Manfredi & Vickers, 2009).

To address the need for employers to avoid age stereotyping and the relative lack of research in this area, this chapter discusses age stereotypes and age discrimination in the workplace and provides specific suggestions for employers to avoid this problem. The following discussion explicates the terminology that is used in this area.

Key Concepts

Age Stereotypes

Age stereotypes are beliefs people have about employees that are related to the age of employees (Levy, 2009). These age-related beliefs function as a stereotype when the general beliefs are applied to a particular employee (Posthuma & Campion, 2009). Thus, age stereotypes are judgments about individual employees based upon their age rather than on their actual knowledge, skills, or abilities. Age stereotypes can result in unlawful age discrimination.

Age Discrimination

The Age Discrimination in Employment Act of 1967 prohibits discrimination against workers over age 40. That statute was enacted, in part, in the belief that age stereotypes cause age discrimination in the workplace. Unfortunately, unlawful employment discrimination occurs when age-related beliefs form the basis for unreasonable and negative employment decisions about older employees (e.g., *Meacham v. Knolls Atomic Power Laboratory*, 2008). The U.S. Supreme Court has stated that prohibited stereotypes about older workers tend to stigmatize older workers and, when they are based on inaccurate and denigrating generalizations about workers based on their age, they can result in unlawful age discrimination (e.g., *Kentucky Retirement Systems v. EEOC*, 2008). These negative employment decisions could include refusing to hire older employees, deciding to lay off older workers, sending only younger workers to training, etc.

For example, a manager may believe that older workers are not as competent in using new computer technology. As a result of this general belief, the manager may decide that a particular, older employee will be unable to learn a new data-processing system that the employer wants to implement. As a result of this age stereotype about older workers in general, the manager makes a specific decision about this particular older worker and hires a younger employee without having any reasonable basis for doing so.

Suppose the manager needs to hire either Ollie or Kit. Ollie is older than Kit. As a result of a general negative belief about older workers, Ollie is viewed less favorably because of his age. Without any particular reason to believe that Kit is more competent than Ollie, the manager hires Kit. In fact, the manager goes so far as stating that he really would prefer to hire a younger worker for this job because older workers are harder to train. This is an example of age discrimination based on age stereotyping.

Although this is just a hypothetical example, there are real cases in which the federal judiciary has agreed that there is a direct link between age stereotyping and age discrimination. This is true even though it has been widely reported that the U.S. Supreme Court has raised the bar on the level of proof needed to sustain an age discrimination complaint. Now, plaintiffs must show that age was more than a motivating factor in the employer's decision. Plaintiffs must prove that the age bias caused the decision and that if it was not for the age bias, the discrimination would not have occurred (e.g., *Gross v. FBL Financial*, 2009).

Nevertheless, there are age stereotyping cases where plaintiffs can meet this burden of proof. For example, in *EEOC v. Town of Huntington* (2008), a federal district court in New York heard evidence about how a 38-year-old supervisor fired a 58-year-old youth counselor and replaced the counselor with someone in her twenties. In that case the supervisor allegedly made these remarks about the older counselor:

> "[S]he was too old for the clients to relate to and that she would be ineffective as such."
>
> "[T]he position needed a much younger individual to be effective in that role [and] went on to compare

[plaintiff] to younger counterparts (all in the age range of 22 to 29) who had previously held that position."

"[Sh]e would fail in comparison due to, what [the supervisor] perceived to be, her advanced age." (*EEOC v. Town of Huntington*, 2008: 1)

The court held that this was sufficiently direct proof of age discrimination based on age stereotyping and permitted the plaintiff's case to proceed.

Another federal court case further delineated the line between permissible hiring factors and unlawful age stereotyping. In *Ford v. Potter* (2008) a federal district court in Texas held that the employer could use the word "vibrant" as a legitimate criterion for making a decision about whom to promote. In contrast, that same court also held that the word "youthful" as a hiring criterion was evidence of age discrimination. Other research shows how stereotypes about older workers having less "drive" or being less attractive to younger customers have resulted in a significant number of age discrimination lawsuits (Roscigno, Mong, Byron, & Tester, 2007).

The above examples illustrate what is known as "disparate treatment" discrimination. It is based on specific treatment and evidence of intentional discrimination against someone based on his or her age. Another important form of age discrimination is known as "disparate impact" age discrimination. Unlike disparate treatment, disparate impact does not require proof of intention to discriminate. However, although it is a facially neutral employment practice, it has an adverse effect (or impact) on a protected group (Paetzold, 2005). Disparate impact age discrimination requires proof of statistical disparities between older and younger workers in hiring decisions. Chapter 32 in this volume provides a more complete explication of the similarities and differences between these two types of age discrimination.

Age Bias

There is a distinction between age stereotypes and age bias. In a cause-and-effect relationship, age stereotypes can be considered the cause and age bias the effect. Age stereotypes are specific cognitions, conscious or unconscious, about employees based on their age. These specific thoughts could be that older workers are less flexible, less energetic, etc. As a result of the decision-maker's acceptance of these specific beliefs, he or she has a less favorable view of older workers in general.

Age bias is an error in judgment that results from a general tendency to think either too positively or too negatively about older workers (Clapham & Fulford, 1997; Gordon & Arvey, 2004). This general tendency can be the result of specific age stereotypes. Alternatively, age bias could simply be a general tendency to favor or disfavor workers based on their age. Thus, someone who thinks that all older workers have more negative world views (an age stereotype) may give older employees unnecessarily harsh performance evaluations of their work attitudes (negative age bias).

Ageism

There is also a distinction between age bias and ageism. Whereas age bias is an error in age-related judgments, ageism is both prejudice and employment discrimination that negatively affects older workers (Rupp, Vodanovich, & Crede, 2005). Ageism can be the cause of employment discrimination that results from unfounded negative stereotypes about older workers (Posthuma & Campion, 2009). Negative age biases could result from these stereotypes, which may ultimately cause age prejudice and/or discrimination.

Age Stereotypes Influence Important Workplace Decisions

There is substantial empirical evidence to show that age stereotypes are commonly held in many work situations (Kite & Wagner, 2002). Unfortunately, these commonly held age stereotypes all too often affect important employment-related decisions (Taylor, 2001).

In fact, it is quite common for age stereotypes to influence important job-related decisions in situations where managers are making subjective appraisals of external job candidates or current employees (Sterns & Alexander, 1988). Unlike objective appraisals based on facts such as actual dollar volume of sales, number of good-quality widgets produced, etc., subjective appraisals invoke a cognitive process in the evaluators in that stereotypes can act as heuristics that result in satisfactory, yet less than optimal decisions. Prior research shows that older workers with the same qualifications often receive lower subjective evaluations on performance in job interviews or in job performance reviews (Avolio & Barrett, 1987; Finkelstein, Burke, & Raju, 1995; Gordon, Rozelle, & Baxter, 1988; Haefner, 1977; Levine, 1988).

Nevertheless, the good news is that research has shown that there are certain facets of the performance appraisal process that may be exacerbating the problem of age stereotyping (Rosen, Jerdee, &

Lunn, 1981; Shore & Goldberg, 2005). Because these problems can be identified, organizations can modify them to reduce the negative impact of age stereotyping. For example, since some forced-ranking appraisal systems increase biases against older workers in layoff situations, those appraisal systems can be replaced with other systems that do not result in this negative outcome (Osborne & McCann, 2004).

A Meta-Framework for Age Stereotypes Research: Age Stereotypes as Moderator and Mediator Variables

In many theoretical models, constructs are identified and defined, and then the expected relationships between those constructs are predicted using propositions that are developed based on prior research and sound logic. Following the explication of a particular theoretical model, specific variables that represent the constructs in the model are identified and used to test the validity of that model.

In this chapter we propose something a little different. Here, we propose a meta-framework for research on age stereotypes. This meta-framework consists of five categories of constructs. Each of these constructs within the five categories can be represented by specific variables. These five categories are worker age, outcomes of age stereotypes, age stereotypes, upstream moderators, and downstream moderators. One of the categories of constructs, age stereotypes, is represented as the central idea in this framework. The purpose of this representation is to illustrate how age stereotypes fit into this meta-framework as moderator or mediator variables. As a type of meta-theory, this framework serves as a guide for other researchers who can then more fully explicate the proposed theoretical relationships between specific constructs and the variables that represent them.

The advantage of providing a meta-framework such as this is that it will guide and direct researchers to frame or organize their research streams around a model that can enable better-coordinated and faster growth and development of the field of workplace age stereotype research. There is another important advantage in using the five, more loosely defined sets of constructs in this model rather than a specific and limited set of constructs and variables. These more loosely defined categories give researchers the opportunity to frame and design their research in ways that tap into their own insights and research streams and thereby receive credit for their own innovative ideas, theoretical developments, and empirical findings. In fact, there is a need to more fully develop and define the constructs that fit into these five categories, as the discussion below illustrates. The following is a general overview of how age stereotypes fit into this meta-framework.

Often age stereotypes function as either moderator or mediator variables that influence the effects of other variables related to age (Baron & Kenny, 1986). Figure 16.1 illustrates these relationships. This figure is an adaptation of the previously published moderator–mediator model proposed by Posthuma and Campion (2009).

Moderators

Age stereotypes acting as moderator variables can explain the degree or direction of relationships between worker age and outcomes. Moreover, age stereotypes have two categories of moderators: upstream and downstream. These are variables that influence the degree or direction of relationships between age stereotypes and their antecedents (upstream) or effects (downstream).

Mediators

Age stereotypes acting as mediator variables explain the why or how in the relationships between worker age and outcomes. The following discussion goes beyond the initial description of the moderator–mediator model and provides further explanation of the types of research that can be conducted in accordance with that model.

The upper left-hand box in this figure represents the actual age of workers. Each of the other boxes

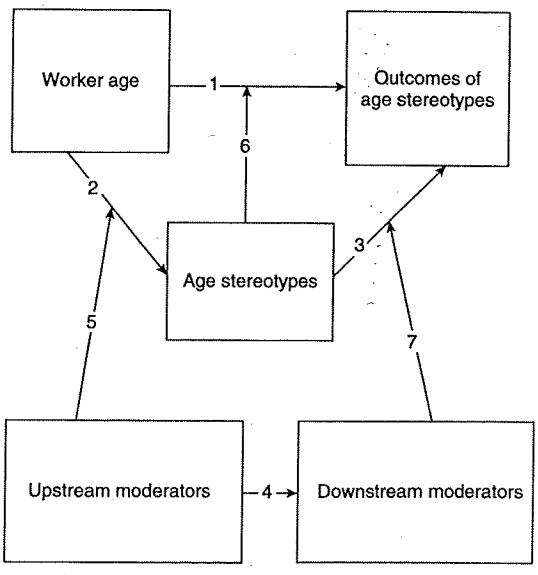

Fig. 16.1. Moderator and mediator effects of age stereotypes.

represents a category of variables. The lines between the boxes represent relationships that should be explored in future research. The following discussion further defines the categories of variables and then discusses the relationships between each of these categories.

Worker Age

Worker age represents the chronological age of employees from the time of their birth. It has been said that age is "just a number" (Cotter, 2008). However, in the workplace, age is much more than just a number. Age is significant in how workers are evaluated and who is hired, promoted, offered training, or laid off. Moreover, there are many aspects and dimensions of chronological age that make it important. For example, there are significant differences between men and women. Not only do women tend to live longer than men, but men and women also age differently. The biological and psychological stages that men and women pass through as they age are quite different. Moreover, many women may take years out of their work lives to raise a family, and for that reason they may not have earned job benefits related to seniority (Manfredi & Vickers, 2009). These factors should be considered in future research.

In addition, there are specific, potentially salient terms and milestones in considering age stereotypes. For example, people often use age in decades as a heuristic to generalize about people of a certain age (e.g., those in their sixties are different from those in their fifties).

Also, there should be consideration to the implications of age as more than simply a linear continuous variable. Across the different ages of workers, there are milestones that can serve as benchmarks, heuristics, or particularly salient ages. For example, it was often thought that age 65 is the presumptive age when someone should retire in the United States (Manfredi & Vickers, 2009). Moreover, there is evidence that age is often related to other factors in nonlinear ways. For example, Posthuma (2009) found a complex curvilinear relationship between age, uncertainty avoidance, and union membership across 32 countries. These examples illustrate how age is more than just a number and how the multiple dimensions of age itself can provide many avenues for future age stereotyping research.

Age Stereotypes

When people have beliefs and expectations about workers based on their age and not on the particular knowledge, skills, and abilities of those workers, they hold workplace age stereotypes (Hamilton & Sherman, 1994). The sad truth is that all too often these workplace age stereotypes are not only negative but also inaccurate (Fiske & Neuberg, 1990). In fact, an extensive meta-analysis by Gordon and Arvey (2004) has shown that there is a general tendency for employers to prefer younger workers.

There are many reasons why people hold these stereotypes. Although they can be based on hearsay, prejudice, or opinions rather than fact, these negative workplace age stereotypes share one common characteristic: they all cause managers to believe that particular older workers will have those same characteristics as other older workers simply because of the worker's age (Fiske & Taylor, 1991).

Managers can hold negative stereotypes about older workers that are subtle or unconscious, yet these may affect how managers think about older workers. The result can be discrimination against older workers when they are not hired, not selected for training, or targeted for layoffs. Thus, although the influence may be subtle, the cause may be age stereotypes and discrimination.

Many different types of age stereotypes have been identified (Posthuma & Campion, 2009). A few stereotypes are positive stereotypes that make favorable generalizations about older workers. Some of these stereotypes suggest that older workers are more dependable, honest, trustworthy, loyal, etc. However, it is much more common to see negative stereotypes about older workers that make unfavorable generalizations about these workers. Some of these stereotypes suggest that older workers are less productive, resistant to change, and less able to learn, will have shorter job tenure, and are more costly.

Although workplace age stereotyping may be common, it has been shown repeatedly that the negative stereotypes about older workers are usually inaccurate (Posthuma & Campion, 2009). For example, although a common stereotype is that older workers have lower job performance, the evidence contradicts this stereotype. In fact, there is very little empirical evidence that shows job performance declining with increasing worker age. To the contrary, job performance often improves as workers get older. Moreover, even the evidence of declining job performance shows that the effects of age were quite small. In fact, differences between workers in their level of job performance are much more likely to be caused by differences in the skills and health of different workers. In support of

this conclusion, the empirical evidence shows that differences in worker job performance within age groups (based on factors such as skill, health, motivation, etc.) are much greater than differences between age groups (Posthuma & Campion, 2009). For example, the differences in performance levels of employees within two age groups, all those within their forties and all those within their fifties, are greater than the differences in performance levels of all those in their forties versus all those in their fifties. As a result, managers who want to get the highest return on their investment should strive to improve workers' job performance by focusing on improving the skills, health, motivation, etc. of individuals who need this type of improvement rather than make faulty hiring and layoff decisions based on unfounded stereotypes about all older workers.

Another common stereotype is that older workers are not good candidates for job training and employee development because they will have shorter job tenure, and therefore the payback on the investment in training will be less than for younger workers (Greller, 1999; Hedge, Borman & Lammlein, 2006; Hutchens, 1993). However, the evidence contradicts this assumption as older workers are less likely than younger workers to quit and seek other jobs. In addition, the payback period for most job training interventions is often quite short. Thus, older workers do not constitute poorer investments than younger workers (Hedge, Borman, & Lammlein, 2006; Levine, 1988).

Outcomes of Age Stereotypes

This category of variables relates to outcomes that are the results of age stereotypes at work. There are two major categories: outcomes for the workers, and outcomes for the employer.

OUTCOMES FOR WORKERS

Older workers who suffer from the effects of unfounded negative stereotypes may miss out on opportunities to work up to their full potential. For example, they may not be selected for training that could improve their skills.

OUTCOMES FOR EMPLOYERS

Undoubtedly, employers who permit their managers to succumb to negative and unfounded stereotypes are losing out on a valuable pool of potentially productive employees (Stark, 2009; Wang & Shultz, 2010). Another potential negative outcome for employers from age stereotyping is the possibility of costly employment lawsuits for unlawful age discrimination (Bjelland, Brayere, von Schrader, Houtenville, Ruiz-Quintanilla, & Webber, 2010).

Upstream Moderators

Upstream moderators influence the relationships between age and age stereotypes. The literature suggests that these upstream moderators are often based on differences between people who are evaluating workers, industries, and other factors that are primarily cognitive or perceptual, including job stereotyping and the degree to which age is perceived as salient. For example, when jobs are stereotyped as more appropriate for younger employees, the degree to which worker age is related to age stereotyping can increase (Cleveland & Hollman, 1990).

Downstream Moderators

Downstream moderators influence the relationships between age stereotypes and outcomes. For example, they can indicate the types of workers or evaluators of workers or the situations in which the influence of age stereotypes on outcomes is stronger or weaker. Whereas prior research on upstream moderators has tended to focus on individual differences, downstream moderator research often focuses on group- or company-level variables such as the characteristics of the workforce and managerial practices. This line of research has shown how management practices can be designed to reduce the likelihood of age stereotyping resulting in age discrimination in employment decisions (Capowski, 1994; Chiu, Chan, Snape, & Redman, 2001). There is great potential for reducing the negative effects of age stereotyping when organizations implement practices to minimize their negative effects (Znidarsic & Dimovski, 2009).

Explication of Paths in the Meta-Framework

The main effects in this model are illustrated by paths numbered 1, 2, 3, and 4. Moderator effects are illustrated by paths 5, 6, and 7. Finally, the path from age to age stereotypes (Path 2) and from age stereotypes to outcomes (Path 3) illustrates a proposed mediator effect (Fig. 16.1). Each of these relationships is described more fully below.

DIRECT EFFECTS OF AGE ON OUTCOMES (PATH 1)

This line of research focuses on the direct effects of age on important work-related outcomes. Much of this research does not focus specifically on the effects of age stereotypes. For example, a recent study

showed how increasing job complexity, focus on opportunities, and job control can have positive effects on the relationships between age and performance outcomes such as work performance and creativity (Binnewies, Ohly, Niessen, 2008; Zacher, Heusner, Schmitz, Zwierzanska, & Frese, 2010). Nevertheless, a prominent outcome of Path 1 is the outcome of age discrimination. This is the negative result that occurs when age and/or age-related stereotypes result in older workers receiving less favorable consideration. However, research that focuses only on these direct effects does not do much to inform our field about the reasons why this occurs or the conditions under which it is more or less likely to occur.

DIRECT EFFECTS OF AGE ON AGE STEREOTYPES (PATH 2)

Typically, this research identifies specific types of stereotypes that are activated as workers get older. It could be said that when age induces the activation of cognitions of age stereotypes, ageism is likely to occur.

DIRECT EFFECT OF AGE STEREOTYPES ON OUTCOMES (PATH 3)

This line of research focuses on the direct effects of age stereotypes on outcomes for employers and employees. For example, this path indicates that age stereotypes, such as a cognition that older workers cannot learn to operate computers, could directly increase outcome factors such as age discrimination. Moreover, when age stereotypes induce lower ratings for older workers, then age bias occurs.

DIRECT EFFECT OF UPSTREAM MODERATORS ON DOWNSTREAM MODERATORS (PATH 4)

This research direction focuses on the direct effects of upstream moderators on downstream moderators. This path indicates that the variables influencing the relationships between age and age stereotypes could also influence other variables that influence the relationships between age stereotypes and outcomes. For example, the same negative cognitions about older workers that can increase the likelihood of age stereotypes (upstream moderators) may also induce an organization's decision-makers to be less likely to adopt the kinds of training and other interventions that could reduce the negative impact of age stereotypes (downstream moderators).

UPSTREAM MODERATORS' INFLUENCE ON THE RELATIONSHIPS BETWEEN AGE AND AGE STEREOTYPES (PATH 5)

This research focuses on how upstream moderators influence the relationships between age and age stereotypes. As moderator variables, these factors can change the size or direction of these relationships.

INFLUENCE OF AGE STEREOTYPES ON THE RELATIONSHIPS BETWEEN AGE AND OUTCOMES (PATH 6)

The focus here is on how age stereotypes can moderate the influence of age on outcomes for employers and employees. For example, this is the type of research that can show how age stereotypes could increase the amount of age discrimination that workers suffer in the workplace.

DOWNSTREAM MODERATORS' INFLUENCE ON THE RELATIONSHIPS BETWEEN AGE STEREOTYPES AND OUTCOMES (PATH 7)

This line of research concerns the influence of downstream moderators on the relationships between age stereotypes and outcomes for employers and employees. As moderator variables, these factors can change the size or direction of the effects of these relationships. Organizational diversity training may be a good example of this type of moderator. Organizations that include age as part of their diversity training may reduce the likelihood that, even though individuals may entertain age stereotypes, those stereotypes will result in actual age discrimination.

THE MEDIATOR EFFECT OF AGE STEREOTYPES ON THE RELATIONSHIP BETWEEN AGE AND OUTCOMES FOR EMPLOYERS AND EMPLOYEES (PATHS 2 AND 3)

This line of research focuses on how age stereotypes explain why age is related to outcomes. The framework shown here represents a partial mediator effect since there is also the possibility of direct effects of age on outcomes. Thus, to the extent that age stereotypes explain the cause-and-effect relationship between age and age stereotypes, they are an intermediary cause.

As discussed above, the Supreme Court now requires that plaintiffs prove that age is a "but for" cause of age discrimination (*Gross v. FBL Financial*, 2009). This means that if there are other causes behind the employment decision, the claim of age

discrimination cannot be sustained. It is interesting to consider how this might be thought of in terms of mediator and moderator variables related to age stereotyping.

First of all, it should be noted that age stereotyping can be a cause of unlawful age discrimination. However, the courts do not require that age stereotyping be the "but for" cause of age discrimination; rather, they require only that age be the "but for" cause. Nevertheless, it seems that if the plaintiffs were able to prove that age stereotyping was not just a partial mediator effect but a complete mediator effect between age and age discrimination, their case would be much stronger. However, it is difficult to imagine how plaintiffs might offer such proof. Much more probable is the possibility that it could be shown how age stereotyping is a moderator variable that increases the relationship between age and age discrimination or a partial mediator that partially explains the relationship between age and age discrimination. To the extent that plaintiffs could show either of these, perhaps through the evidence of age stereotyping-related remarks made by supervisors making decisions, they would be able to show that age stereotyping is an unlawful and impermissible motive. This would strengthen their case.

However, plaintiffs must now show that age discrimination is a "but for" cause. This means that what the court calls the burden of persuasion does not shift to the plaintiff as it does in other types of employment discrimination cases (*Gross v. FBL Financial*, 2009). When employers make their decisions based on other reasonable factors such as a disability retirement plan (*Kentucky Retirement Systems v. EEOC*, 2008), even though there is some minimal evidence of age stereotyping exacerbating (a moderator variable effect) or partially explaining (a partial mediator variable effect) the influence of age on age discrimination, a plaintiff's case may not be permitted to proceed.

Future Research Directions

The following discussion highlights several areas for researchers to address as they study age stereotypes in the workplace. Prior research provides additional examples of future research directions (Posthuma & Campion, 2009).

Examine More Complex Relationships Using More Sophisticated Methods

As the field of workplace age stereotype research continues to mature, researchers should focus more on complex relationships between variables to enhance our understanding of this field. Prior research has shown that there are main effects such as those illustrated by the direct effects (i.e., age stereotypes increase age discrimination). At this point in the development of the field, moderator, mediator, and other more complex relationships should be studied. This may entail using methodological and statistical techniques that go beyond experiments using students acting as hypothetical employees and analyses using variants of the ANOVA family of statistical techniques. Although there still is a place for this type of study, researchers should be encouraged to use other techniques such as hierarchical linear modeling (HLM) to test for group-level effects and structural equation modeling to test for more complex relationships such as those illustrated in Figure 16.1. This could also include studies that examine the dimensional structure of age stereotypes across cultures using confirmatory factor analyses and measurement equivalence techniques across languages and cultures. Researchers should move beyond simple linear effects and look toward identifying curvilinear affects that are related to the aging process.

Some possible topics for more complex research of this type would include studies that examine whether the effects of age stereotypes have stronger effect sizes at different ages. Researchers should also examine nonlinear relationships such as threshold effects (e.g., do age stereotypes become more prevalent at age 50, 60, 65, etc.).

In addition, researchers have all too often relied on either experimental or cross-sectional designs to the exclusion of longitudinal studies. Perhaps more than in any other areas, age stereotyping research should use longitudinal research that can more definitively identify effects on the same individuals as they age.

Researchers should examine the extent to which organizations can successfully differentiate the promulgation and encouragement of a vibrant, active, and positive organizational culture that does not stereotype older workers from a youth culture that may marginalize older workers (Schneider, 1987).

Study Managerial Practices that Reduce Age Stereotyping and its Effects

One of the best ways researchers can help organizations avoid the negative effects of age stereotypes is to identify and study the best managerial practices. Generally, these practices will help organizations

create a more friendly and respectful work atmosphere for older workers (e.g., Steinhauser, 1988; Walker, 1999). For example, Walker (1999) proposed a number of such practices, including having a supportive human resource climate in general and placing a high value on older workers in particular, generating the commitment of the aging workers involved, and having the support of senior management regarding the management of older workers. As a result of the implementation of these practices, older employees may perceive that their organization values them more.

Identify Improved Methods to Evaluate Employees While Avoiding Stereotyping

An important topic for future research is employee evaluation methods that will reduce age stereotyping (Faley, Kleiman, & Hall-Lengnick, 1984). For example, to the extent that a performance evaluation system uses the future developmental potential of an employee as a factor in the evaluation, there may be a greater tendency for managers to engage in age stereotyping. Yet, in some situations and for some organizations, future developmental potential can be an important evaluation criterion. Thus, simply eliminating future developmental potential may not be a feasible or advisable recommendation. This line of research could differentiate types of evaluation systems, factors evaluated, and types of work tasks performed, some of which may be age-stereotyped.

In addition to improving the accuracy of employee evaluations, research should also examine how older employees perceive these systems. For example, in the organizational justice literature, there are at least three different types of justice: organizational, procedural, and interactional (Posthuma & Campion, 2008). It may be that older workers, seeking respect and dignity earned from their many years of working, may be more sensitive to the degree of interactional justice than younger workers (Ambrose, Hess, & Ganesan, 2007).

Examine the Impact of Training Designed to Reduce Age Stereotyping

Prior research in the field of sexual harassment, race, and gender discrimination has shown promising results for reducing stereotyping in those areas (Brewer & Miller, 1984). Recent research has shown that those who perceive relatively low levels of racial discrimination at work perceive higher levels of procedural justice in the workplace when their organization shows that it values diversity (Triana & García, 2009). Following the group values model of procedural justice, this line of research shows promise for applicability to age stereotyping as well. Perhaps older workers will also perceive higher levels of procedural justice in the workplace if they perceive that their organization's diversity efforts include older workers in the definition of a diverse workforce. If so, older workers may also be less likely to voluntarily leave their organization (Posthuma, Maertz, & Dworkin, 2006) and be more willing to recommend their employer to other potential job applicants (Maertz, Bauer, Mosley, Posthuma, & Campion, 2004; Posthuma & Campion, 2005). Future research should examine how this type of training should be adapted to achieve similar positive results for the problem of negative age stereotyping. Perhaps older workers who perceive higher levels of procedural justice in other areas such as performance evaluation, dispute resolution, etc., will also have lower turnover rates (Posthuma, 2003; Posthuma, Maertz, & Dworkin, 2006).

Examine the Impact of the Interaction of Different Age Stereotypes

Although most age stereotypes are negative, some are positive. An interesting line of future research is the possibility that these different stereotypes may interact with each other in predictable ways. For example, can the "inability to learn computer technology" stereotype be mitigated by the "more trustworthy" stereotype? Does the "poor performance" stereotype exacerbate the negative effect of the "more costly" stereotype? Is it possible that organizations can tap into human tendencies to stereotype to counteract the negative effects of some stereotypes?

Moreover, there may be other stereotypes that derive from race and sex that may interact with age stereotypes in complex ways. For example, some older people in organizations are male and others are female. Some are Anglo and others are Hispanic. Some are disabled and others are not. Some are obese and others are not (Roehling, Posthuma, & Dulebohn, 2007). More research is needed on the interaction of age stereotypes with stereotypes based on other demographic characteristics. Recent research has suggested that in employment lawsuits, women are more likely than men to experience age discrimination (Roscigno, Mong, Byron, & Tester, 2007). Is this because there is a significant interaction between gender stereotypes and age stereotypes that makes older women particularly susceptible to unlawful discrimination?

Examine the Effects of National Culture on Age Stereotypes

Recent research suggests that age stereotypes are pervasive across countries and cultures. In one study of 26 countries, Lockenhoff et al. (2009) found that perceptions of aging are associated with less physical attraction, lower ability to perform everyday tasks, and lower ability to learn new things. Yet aging was also associated with positive outcomes such as perceived increases in wisdom, knowledge, and received respect. However, these consistent findings across cultures seem to be tied mostly to biological and physiological aging processes. Nevertheless, there are some stereotypes that differ across countries. Certain cultures in countries such as China, India, Malaysia, and New Zealand reported more positive views of aging, including expectations that older people will have more authority within the family and higher degrees of life satisfaction (Lockenhoff et al., 2009). This research suggests that although there are ubiquitous views about aging that may lead to broadly pervasive stereotypes about older workers, there are also perceptions of aging that can differ significantly across cultures, and these should be explored in more depth in future research.

Potentially useful theoretical frameworks for this type of research are social dominance and relational model theories as they relate to national culture (García, Posthuma, & Roehling, 2009). Social dominance theory proposes that societies will have hierarchical structures and that these are supported by in-group bias and consensus. Thus in some cultures youth may be perceived more as the dominant group. In relational models theory, there are four decision-making rules that induce people to make decisions about the allocation of resources (Fiske, 1992). These resource allocations can include decisions about who should be hired and laid off. These rules are market pricing, equality matching, authority ranking, and communal sharing (Fiske, 1992). These models have been demonstrated in many different cultures. These rules have been shown to relate to Hofstede's dimensions of culture (Kagitçibasi, 1997).

By expanding on relational models theory (Fiske, 1992) and connecting it to social dominance theory (Sidanious & Pratto, 1999), it can be shown how and why certain dimensions of national culture may explain differences in preferences for employment of persons of certain demographic characteristics such as sex and nationality (García, Posthuma, & Roehling, 2009). These models may also be useful in explaining how culture relates to preferences for younger workers.

Future research on age stereotyping should strive to go beyond the use of a single model of national culture. Several different models provide alternative formulations of the types of factors that can influence the structure and outcomes of age stereotyping in the workplace. These models include Hofstede (2001), Hofstede and Hofstede (2005), the GLOBE project (House, Hanges, Javidan, Dorfman, & Gupta (2004), Ingelhart, Basenez, Diez-Medrano, Halman, and Luijkx (2004), and others. The need for using different cultural frameworks is illustrated by recent research that compares two frameworks: the Hofstede and Globe frameworks, showing predictable yet differing results (García, Posthuma, & Roehling, 2009; Posthuma, 2009). Specifically, results showed how different sub-dimensions of individualism and collectivism can have different meanings and different effects across cultures. Thus it may be that other dimensions of culture, such as long-term orientation (Hofstede) and future orientation (GLOBE), may also have differing effects on the formation of age stereotypes and how they are used to make decisions about aging workers.

For example, while cultures high on long-term orientation may perceive older workers more favorably and be less likely to form negative stereotypes about them, cultures that have more of a future orientation may view older workers less favorably and be more likely to form and use negative age stereotypes. Researchers should go beyond showing that there are similarities and differences in age stereotypes across countries, but also strive to explain the differences based on these national culture variables.

Recommended Best Practices for Organizations

Given the state of current research and ongoing calls for producing organizational research that is relevant and useful for employers, this section provides specific suggestions on practices that employers can adopt to minimize the negative effects of age stereotyping in their workplaces. It is hoped that by following these practices organizations will be better able to use their older workers and also to avoid expensive age discrimination litigation.

Identify Reasonable Factors Other than Age

Even though recent court decisions have made it clear that plaintiffs bear the burden of persuasion in their age discrimination complaints, it still behooves organizations to identify the reasonable basis for their employment decisions, whether it be hiring,

promotion, layoff, or something else. If the organization can identify and articulate the reasonable basis for its decisions, this will reduce the likelihood that employees will file a lawsuit (Goldman, 2001, 2003; Goldman, Paddock, & Cropanzano, 2004) and win a lawsuit should one be brought (Roscigno, Mong, Byron, & Tester, 2007).

Improve the Accuracy and Validity of Decisions about Workers

Too many organizations continue to rely on selection processes that have low validity and can result in inaccurate assessments of job applicants and workers during important processes such as employee job interviews as well as on other processes used in hiring and promotion (Posthuma, Tsai, García, & Campion, 2006). To counteract this use of less-than-optimal selection practices, organizations should conduct job analyses to identify the tasks, duties, and responsibilities of each job, and then also identify the actual characteristics of workers that are needed to perform those jobs effectively (Huselid, 1995; Yeung & Berman, 1997). These relevant worker characteristics are knowledge, skills, abilities, and other characteristics related to the job. Organizations should then design objective measures of these characteristics and, for incumbent employees, actual job performance. Managers should then be trained on how to properly use these tools. When this occurs, managers will be able to rely on job-related and legally defensible tools rather than on age and other illegitimate decision-making criteria.

Ironically, organizations all too often seek what they think are short-term gains and suffer negative consequences in the long run. This can occur, for example, when they choose to hire marginally productive temporary workers rather than seeking to retain their longer-tenure and often older workers, who may be much more productive (Posthuma, Campion, & Vargas, 2005a, 2005b).

Use Training and Development Activities to Reduce the Impact of Age Stereotypes

Organizations should use training programs to enable managers to identify and avoid the use of common age stereotypes. This type of training will likely use the evidence that shows that these stereotypes are false. The training program should provide other alternative and validated decision-making tools as substitutes so that managers have something to rely on to make more effective decisions. In this way, the natural human tendency to be susceptible to age biases or stereotypes can be overcome by actual and valid expectations of future job performance.

In addition, these training interventions should ensure that managers understand that their organization often becomes legally liable for discrimination based on the comments that they make during the selection or appraisal process (Roehling, Posthuma, & Dulebohn, 2007). They should be cautioned to avoid saying things specifically related to age, such as a preference for "younger" workers. In many cases, the courts have permitted comments such as "vibrant" or "energetic" to be used as legitimate and nondiscriminatory motivations for hiring, promotion, etc., but more directly age-related descriptors are to be discouraged.

In addition, organizations should avoid a preference for selecting younger workers for inclusion in training programs. Age should not be a factor in deciding who should be trained. Moreover, there is evidence that older workers may benefit even more than younger workers when they are given responsibilities that are more cognitively complex. Thus, training and development programs that cognitively challenge all workers, including older workers, are appropriate.

Use a Risk-Management Approach to Reduce Age Stereotyping

Risk management is a process of identifying the most frequent and most severe losses that an organization may suffer and to target cost-effective interventions to reduce the likelihood and severity of those losses (Mehr & Hedges, 1974). Organizations can use this approach to identify the most frequent and severe losses that they might suffer from age stereotyping. For example, they may suffer losses from discrimination lawsuits, turnover of older workers, or loss of productivity because of more frequent hiring of younger workers based on an unfounded belief that younger workers will be more productive (Posthuma, Roehling, & Campion, 2005). Once the most frequent and/or severe losses from age stereotyping are identified, organizations can then target interventions to reduce the likelihood that age stereotyping will occur and, if it does occur, that the losses will be minimized. These interventions might include a number of good managerial practices. For example, an organization might revamp its employee compensation system to make it more closely related to actual worker productivity and not

permit preferences for certain workers based on their age. These targeted interventions might reveal that for certain jobs (e.g., computer information systems analyst, customer representative with younger clientele), there is a greater likelihood and/or higher risk that managers will engage in age stereotyping. The organization can then target those high-risk areas for training to reduce the likelihood that age stereotyping will occur.

In addition, it is important for organizations to understand that when a claim for discrimination occurs, whether it be for age-related or some other type of employment discrimination, there are appropriate ways to handle the claim so that the cost of the loss is minimized. In general, treating employees with procedural justice (processes) as well as interactional justice (respect and dignity) has the potential to reduce the cost of the claim (Goldman, 2001, 2003; Goldman, Paddock, & Cropanzano, 2004). In addition, the effective use of alternative dispute-resolution processes such as mediation and arbitration can help reduce the overall cost of lawsuits (Posthuma, 2005; Posthuma, Dworkin, & Swift, 2000, 2002).

Choose to Use Older Workers as a Unique Source of Sustained Competitive Advantage

There are two ways to think about older workers in the workplace. The first focuses on the negative and implies that the problem of age stereotyping is just one more thing that managers need to work with. The second is to think of older workers as a unique source of sustained competitive advantage (Zinke, 2008). The strategic management literature shows that some firms find ways to do things differently from their competitors (unique), which gives them a sustained (i.e., over time) source of competitive advantage that enables them to be more profitable and successful than their industry peers (Barney, 1991, 1997). A firm's human resources can give it a sustained source of competitive advantage (Wright, MacMahan, & McWilliams, 1994). Given the tendency, particularly in some industries, to engage in age stereotyping, many firms may be losing the most skilled and experienced workers because of age stereotyping (Petersen, 2007). This creates a strategic opportunity for other firms who may choose to employ older workers and to include them as an important part of their overall business strategy. Because many firms may not have the desire or capacity to overcome the tendency to engage in age stereotyping, those firms that recognize that it can—and should—be avoided have an improved opportunity to recruit, hire, train, motivate, and retain older workers (DeSaà-Perez & García-Falcon, 2002). By avoiding the negative impact of age stereotypes, these firms can use older workers as a unique source of sustained competitive advantage, not just through people but through their *older* people (Pfeffer, 1994).

Conclusions

The field of research on age stereotyping in the workplace has been around for many years, yet in many respects the field is still in its infancy since more sophisticated research designs and research questions are likely to dominate the efforts of scholars in the future. Moreover, given the aging population of the workforce in the United States and many other countries, it is likely that the number of studies in this area will increase considerably in coming years. This trend is likely to be underscored by the changing nature of the legal landscape in the United States, as recent court decisions have changed the rules of the game as they pertain to age discrimination and age stereotyping. These factors should spur more research in this field. With this potential explosion in research, the field will continue to mature and earn greater prominence in our academic literature.

Related Chapters

Chapter 9. Studying the Aging Worker: Research Designs and Methodologies

Chapter 12. Physical Capabilities and Occupational Health of Older Workers

Chapter 13. The Aging Process and Cognitive Capabilities

Chapter 14. Aging, Personality, and Work Attitudes

Chapter 15. Job Performance and the Aging Worker

Further Reading

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