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Jenkins, Andrew Kevin

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Issues and challenges in investigating perceptions of age discrimination in employment

Introduction

Despite the acknowledgement by government and academics of the existence of age discrimination in employment (for example, The Carnegie Inquiry into the Third Age, 1993; dti, 2003; Taylor and Walker, 1998; Snape and Redman, 2003), compared to other forms of discrimination, relatively little research has been undertaken on this important subject. The UK government believes ageism and age discrimination to be a problem, stating that it is "bad for the individual, bad for business and bad for the economy" (Department for Work and Pensions, 2005, p. 19). Age discrimination in employment is not uncommon. A report on ageism in Britain by Age Concern England, based on interviews with 1843 people throughout the UK, revealed that more people (29%) had suffered from age discrimination, more than any other form of discrimination (Age Concern England, 2005).

In order to utilise the skills and knowledge of "older" workers, employers should address issues of age discrimination as research points to prevalent age discrimination in the labour market (Taylor, 2001). It seems that, compared to younger adults, older workers are disadvantaged in the labour force and this is due to stereotypical views about older employees (Harris, 1990). The hospitality industry employs a predominantly young workforce (Kersley et al, 2006) and much of the industry is style obsessed, particularly designer bars, boutique hotels and celebrity-chef restaurants. The industry seems to be particularly ageist and employers seem determined to discriminate on the basis of age (Clark, 2000, p.24).

This paper will discuss demographic changes in Europe, with particular reference to "older" people, for the purpose of this article, those aged fifty and

above; the nature of ageism and age discrimination in employment and some key findings into research on perceptions of age discrimination in hotel employment in the UK and the Republic of Ireland. The paper concludes with recommendations on how to research perceptions of age discrimination in employment using a conceptual framework developed by the author.

The ageing population and the changing nature of the workforce

The European Union's population is ageing. This is a result of falling rates of fertility, increased life expectancy, effects of the "baby-boom" and migration movements (Commission of the European Communities, 2002). In all OECD countries the proportion of elderly people in the population is forecasted to increase dramatically (Spiezia, 2002). In terms of the fertility rate in the EU, figures have fallen for all countries. For example, the mean number of children born to a woman in the UK in 1961 was 1.94; for Ireland 2.35. This had fallen to 1.86 (UK) and 2.14 (Ireland) to a woman born in 1966 (Eurostat, 2005). The declining fertility rate is the result of a complex interplay of factors, including higher rates of female participation in the labour market, women having children later in life, more women in higher education, increased costs of child rearing, higher divorce rates and an increase in the number of childless women (Hollywood, Brown, Danson and McQuaid, 2003).

With reference to life expectancy in the EU, for both sexes this has increased by eight years during the last forty years and, for the expanded EU, life expectancy at birth stood at 75 years for men and 81 years for women in 2002 (Eurostat, 2005). During the period 1992-2002, life expectancy in the UK increased from 73.6 years to 75.9 years. For Ireland the increase was from 72.7 years to 75.2 years (Eurostat 2004). It is projected that, of all regions of the world, Europe will be the most affected by population ageing with the number of people in the 50-64 age group increasing by 26% in the period 1995-2015 (Taylor, 2001, p.1). In the UK, figures for 2003 show that the population aged 50-64 was 16.9% in 2000; for Ireland the figure was 14.3% (Eurostat 2004). In the UK, the median age of the population is forecasted to increase from 38.6 years in 2004 to 42.9 years by 2031, reaching approximately 45 years by 2060 (Shaw, 2006). There are 19.8 million people

aged 50 and over in the UK (www.statistics.gov.uk). This represents a 24% increase since 1961 and the number is projected to increase by a further 37% by 2031 when the UK will possess almost 27 million people aged 50 and over (www.statistics.gov.uk). As the baby-boom generation of the Mid 1960s age, the working age population of the UK will become older. By 2020, there will be 0.9 million (4%) fewer working people aged below 40 than aged above 40 in the UK (Shaw, 2006). In the UK, people aged between 50 and the State Pension Age (SPA) account for just under 22% of the working population (Age Positive, 2002). Compared to the 25-49 age group, workers aged 50 and above in the UK are more likely to be self-employed, have spent a longer time with their current employer, have fewer qualifications, have lower unemployment rates and are more likely to be long-term unemployed (Age Positive, 2002). People aged 50 and above are more likely to be economically inactive (TUC, 2006). There are 2,486,00 economically inactive women and men aged between 50 and the SPA in the UK and a further 221,000 are unemployed (TUC, 2006).

As is the case with most OECD countries, employment of people aged 50 and over in the UK has declined sharply since the 1970s although in the period 1998 to 2002, the number of people aged 50 and over in employment in the UK increased by 650,000 (Disney and Hawkes, 2003). Furthermore, in the period 1997-2004, the employment rate for people in the UK aged 50 and above but below the SPA increased from 64.7% to 70.0% (Kersley et al, 2006). In particular, the decline in economic activity rates of men aged 50 and older in OECD countries over the last thirty years has been remarkable (Duncan, 2003). At the end of 2002, about seven million people aged 50 and over were in employment in the UK; of these 56% were male (Disney and Hawkes, 2003). Employment rates for older people vary greatly between different parts of the UK with activity rates being considerably lower in Scotland, Wales and Northern England than Southern England (Brown and Danson, 2003). Amongst older people, the unemployment rate is twice as high in Scotland compared to England (Hollywood, Brown, Danson and McQuaid, 2003). In addition, it is likely that severe inequalities exist amongst older people in the UK with respect to employment opportunities with

professional and managerial workers being able to work part-time into their 70s whilst “manual workers with grotty jobs and few skills often lack the opportunity, or desire, to work past their 50s” (The Guardian, 02/12/03). Demand for workers aged 50 and above is likely to be influenced by their substitutability, comparability and cost compared with other workers (Hotopp, 2005).

There is also considerable variation in employment rates between European Union countries. In 2003, the employment rate for persons aged 55 to 64 in the EU’s 25 countries was 40.2% with the UK having an employment rate of 55.5% and Ireland 49% (Eurostat, 2004). The highest employment rate for older workers was found in Sweden (68.6%); the lowest Slovenia (23.5%) (Eurostat, 2004). An ageing population affects the labour market in two ways: it reduces labour supply, thereby influencing the unemployment rate, and increases dependency levels, resulting in higher taxation and a reduction in employment (Spiezia, 2002). Population ageing is likely to be the most important of all demographic changes for the foreseeable future (Hollywood, Brown, Danson and McQuaid, 2003) and will have major implications for everyone in society (Harper, 2000).

Ageism and age discrimination.

Ageism has been defined in many different ways. Butler and Lewis (1973, p.127) developed one of the earliest definitions of ageism, stating that it represents “the prejudices and stereotypes that are applied to older people sheerly on the basis of their age”. Ageism is a form of oppression which arises from a social construction of old age (Biggs, 1993). Furthermore, ageism, as is the case with racism and sexism, pigeonholes people and does not represent peoples’ unique ways of living (Butler and Lewis, 1973).

According to Bytheway (1995, p.14), “Ageism is a set of beliefs originating in the biological variation between people and relating to the ageing process and is in the actions of corporate bodies, what is said by their representatives, and the resulting views that are held by ordinary ageing people that ageism is made manifest”. Similarly, Giddens (2000, p. 587) has defined ageism as “Discrimination or prejudice against a person on the grounds of age”. This is

similar to Glover and Branine's (2001, p.4) definition of ageism as "unconscionable prejudice and discrimination based on actual or perceived chronological age". This definition is perhaps more useful and insightful than Giddens' definition in that discrimination may occur because of a person's perceived age rather than their actual age.

Although the focus of much British government intervention regarding age discrimination has been on the over fifty age group, age discrimination can affect people of all ages and now affects individuals in their thirties and forties (Wersley, 1996). Age discrimination sets older people apart as being different in a generalised and oversimplified way and is a set of social relations which is used to discriminate against older people (Minichiello, Browne and Kendig, 2000). Ageism is a set of beliefs and attitudes which portrays older people in a negative, stereotypical manner, reinforcing the fear of ageing (Hughes, 1995). It combines with globalization to stigmatize older people as bigoted, rigid and backward-looking (Glover, 2001).

Research on perceptions of age discrimination in employment principally concerns professional encounters, i.e. encounters in the workplace. However, these will be affected by the social construction of ageing which, in turn, will be influenced by wider political, economic, socio-cultural and technological factors (Lucas, 2004). As a result of actual or perceived age discrimination, policy will be developed at different levels. The government level may also include supranational government such as the United Nations and the European Union. Within an organisation, discrimination can take one of three forms: individual discrimination, structural discrimination or organisational discrimination (Hollinshead, Nicholls and Tailby, 2003). Individual discrimination concerns prejudice demonstrated by one individual against another; structural discrimination results in certain groups being excluded due to certain practices (e.g. requirements for promotion) and organisational discrimination reflects commonly-held beliefs about the suitability of certain groups for certain jobs (Hollinshead, Nicholls and Tailby, 2003).

Perceptions of Age Discrimination in employment: some findings from HotelCo

In order to establish managers' perceptions of older employees, a survey was undertaken in properties within an international hotel chain which, for the purpose of this article, will be called HotelCo. The survey used a self-administered questionnaire with a mixture of questions, both open and closed, although, for ease of data analysis, the majority of questions were closed. The questionnaire, together with a covering letter and a self-addressed, stamped return envelope, was sent to selected managers of all HotelCo hotels in the UK and Ireland. These managers were selected because they represented a range of management from senior unit managers concerned with strategy making and implementation to departmental managers responsible for functional areas (such as Food and Beverage) and managers of "support" services such as Finance and Human Resource Management. Data was inputted into SPSS, Version 12 and tables, graphs and charts produced using this software and imported into Microsoft Word.

The main attitude question contained statements which could be answered according to one of five options: strongly agree, agree, neither agree or disagree, disagree and strongly disagree. As such, each statement contained an interval level of measurement where intervals along the scale are equidistant (Clegg, 2004). The statements were either positively or negatively stated and were randomly ordered. The questionnaire, together with a covering letter and a self-addressed, stamped return envelope, was sent to the selected managers of HotelCo hotels in the UK and ROI in October 2004. From 116 questionnaires sent, 42 were completed in full. This represents a response rate of 36%.

A summary of the results for the main attitude question revealed that at least two thirds of HotelCo managers strongly agreed or agreed with the following statements:

	% Strongly Agree	% Agree
They (older employees) are very productive employees	16.7	59.5
They work well in teams	7.3	68.3
They have good interpersonal communication skills	7.1	66.7
They are reliable	9.5	76.2
They are conscientious	4.8	64.3

In addition, between 50% and 65% of managers strongly agreed or agreed with the statements shown in the next table:

	% Strongly Agree	% Agree
They (older employees) are more confident	4.8	47.6
They are interested in being trained	4.8	59.5
They are interested more in security than job advancement	2.4	47.6
They have more work-relevant experience	4.8	57.1
They are more committed	7.3	51.2
They are loyal to the organization	2.4	57.1
They are more likely to think before they act	0.0	57.1

At least two thirds of HotelCo managers strongly disagreed or disagreed with the statements in the following table:

	% Strongly Disagree	% Disagree
Older Workers are slow	26.2	42.9
They are unsure of themselves	21.4	54.8
They make many errors	31.7	48.8
They have no ambition	26.2	45.2
They cannot supervise others well	4.8	71.4
They have higher levels of absenteeism	21.4	57.1
They cannot concentrate	14.3	69.0
They are not physically able to keep up with the work	9.5	64.3
They are difficult to work with	9.5	66.7
They have limited skills	14.3	61.9

In addition, between 50% and 65% of managers strongly disagreed or disagreed with the statements below:

	% Strongly Disagree	% Disagree
They (older employees) fail to keep up with changing methods of work	19.0	38.1
They will not take on any additional responsibilities	4.8	59.5
They need longer rest periods more often	7.1	54.8
They need more time to learn more operations	7.1	42.9

Overall, an analysis of the main attitude question of forty statements in the questionnaire revealed that HotelCo's managers were positive about older employees (aged fifty and above), with an overall mean of 3.59, representing a position closest to "agree" on positive statements and "disagree" on negative statements. HotelCo managers' positive inclination towards older employees may have been affected by the phenomenon of "sageism" where the assumption is made that the older person is wise (Minichiello, Browne and Kendig, 2000). Alternatively, the research instrument, namely a questionnaire, may have produced socially-desirable responses as a survey of attitudes towards minority groups may not produce accurate and honest responses (Riach and Rich, 2002). It is also feasible that HotelCo managers are truly positive about the merits of older workers.

In addition, interviews were conducted with selected managers and older employees (aged fifty and above) in HotelCo. Ten interviews were held with Human Resource Managers, five in the ROI and five in the UK. Twenty four interviews took place with older employees, eleven in the ROI and thirteen in the UK. Interviews took place in June 2005 (Republic of Ireland) and between July and August 2005 (The UK). Lack of space precludes in-depth discussion of the findings of these interviews.

With regards to recruitment, interviews with Human Resource managers revealed a number of practices which may, potentially, be discriminatory towards older workers. Firstly, the company website proved to be a popular method used in the recruitment for all positions in the UK and Ireland. This may place older people at a disadvantage as internet access, computer ownership and computer skills are higher amongst younger people. A 2005 report by MINTEL revealed that 68% of those aged 25-34 owned a desktop computer compared to 55% of those aged 55-64. The same report revealed that 27% of those aged 25-34 had broadband internet connection compared to 15% for those aged 55-64.

Secondly, both in the UK and Ireland, Human Resource managers stated that colleges were an important source of recruitment for their properties,

particularly in relation to the recruitment of casual staff. Again this may favour younger applicants as an overwhelming majority of students at colleges and universities in Ireland and the UK are under the age of twenty-one. For example, in the UK, almost 80% of students beginning full-time first degree study are aged 18-20 (Weko, 2004). Of full-time enrolments to Irish higher education institutions in 2004-2005, of the 80,639 enrolled, only 6,420 (8%) were aged 30 and over (The Higher Education Authority (of Ireland), 2005). Furthermore, the use of word-of-mouth recruitment could, potentially, disadvantage older people as existing hospitality workers, who tend to be under twenty five, may inform friends of vacancies in the property.

Interviews with older workers in HotelCo properties revealed that some workers that age wasn't important while others did not feel comfortable with the word "older", preferring instead to use the term "mature". This may be a sign of "gerontophobia", as discussed by Germaine Greer in *The Guardian* (14/09/05) who claims that "Old people themselves are in denial about their degree of ageing and do not thank those who remind them of it". Opinions were divided on whether older workers thought the hotel's management preferred young recruits. An Irish employee stated that younger managers were more likely to choose younger staff whilst a different employee thought management didn't have a deliberate age group in mind but were mindful of the cost. This may confirm Price's (1994) contention that the hotel and catering industry operates a cost-minimization strategy, using disadvantaged labour in operational positions and utilising personnel practices which keep costs low. In general, older workers did not feel they were treated any differently by managers because of their age.

The older workers who were interviewed commented on their positive working relationships with younger workers with mutual respect being important in fostering good relations. Respondents were asked about the skills which they had as an older person which a younger person wouldn't have and, conversely, skills which a younger person would have which they, as an older person, wouldn't have. Older employees believed themselves to be better at dealing with customers/looking after customers, have better judgement, be

better able to evaluate the consequences of actions, have more (life) experience, have greater insight into the job, have greater commitment to the job, have good communication skills, be more mature, proactive, patient, diligent and diplomatic. Older employees believed younger employees to have better computer skills, be better qualified/educated and to be more confident, enthusiastic, modern in outlook, energetic, flexible and up to date with regulations. Some older workers did not consider ageism to be a problem. Others were aware that it existed with a male UK-based worker claiming that ageist attitudes were widespread in the industry. An Irish worker considered the General Manager's attitude important with respect to the employment and treatment of older people in the hotel.

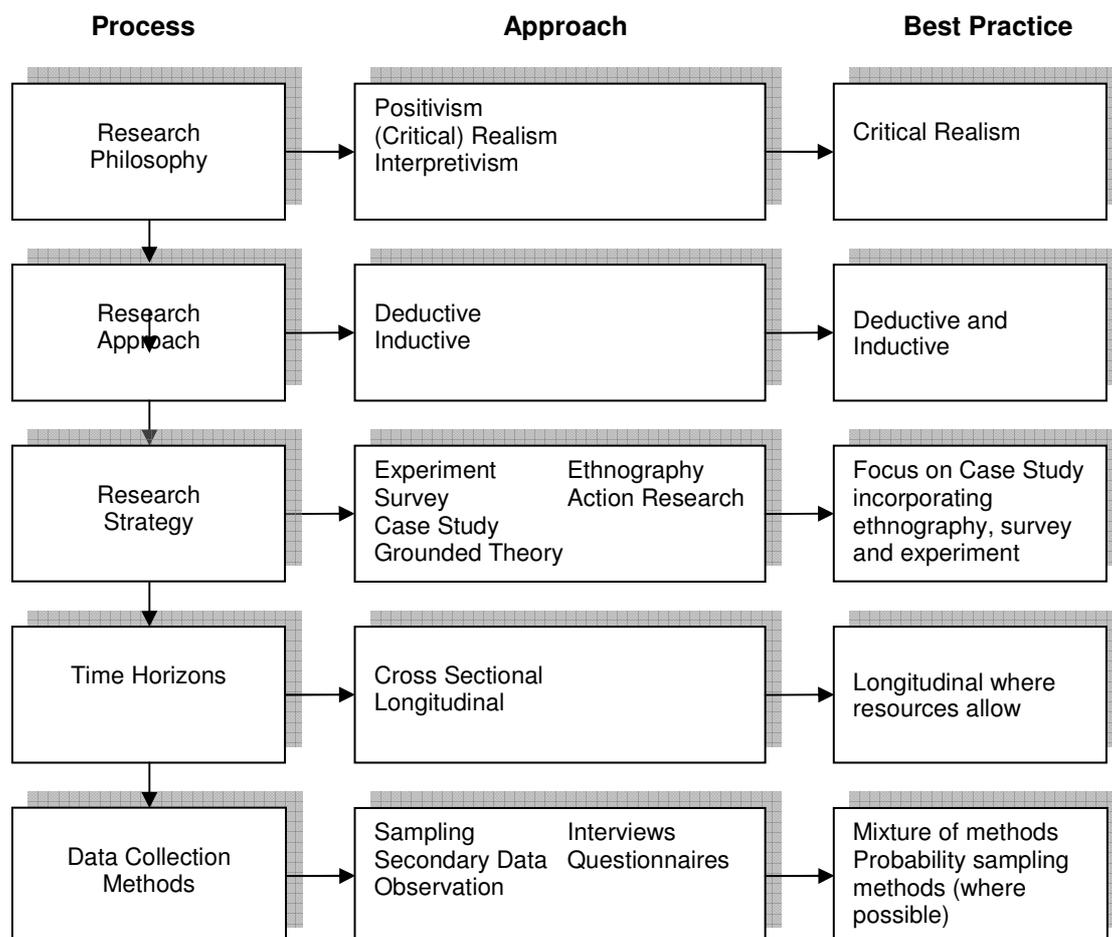
Researching perceptions of age discrimination in employment: Issues and challenges

There are a number of issues and challenges in undertaking research into perceptions of age discrimination in employment. This final section will discuss four major issues before proposing a model for researching perceptions of age discrimination in employment. Firstly, the researcher will need to define the meaning of "age" and "old age". However, it is difficult to establish the moment at which a person becomes old. This is because old age is an imprecise term (Minois, 1989). In relation to this paper, an "older" worker is defined as a person aged fifty or above. The rationale for choosing chronological age for research on perceived age discrimination in employment is that it is an objective, knowable measure of age. Furthermore, much research on ageism in employment uses the age-band of fifty and above to define an older worker. For example, The Cabinet Office's (2000) report "Winning the Generation Game" focused on people aged between 50 and state pensionable age. Secondly, discrimination is related to the notions of equality and inequality which are difficult to define, their meanings are ambiguous and they are used to mean different and sometimes contradictory things (Levin et al, 1992). Moreover, the concept of equality in employment is a constantly evolving concept and is influenced by a multiplicity of factors. Thirdly, it is often difficult to establish that age discrimination has taken place

as much age discrimination in the workplace is subtle (Cooper and Torrington, 1981) and appears to be deeply embedded in the policies, practices and cultures of many organisations (Hollywood, Brown, Danson and McQuaid, 2003). Fourthly, age discrimination cannot be measured in a purely positivistic manner. As research on perceptions of age discrimination in employment needs to expose underlying causal mechanisms, the use of statistical methods and techniques will not uncover such mechanisms (Johnson, 2003).

From a reading of the above, it is evident that age discrimination is a complex phenomenon which requires a multifaceted and sophisticated research strategy. Figure 1 outlines a strategy for conducting research into perceptions of age discrimination in employment.

Figure 1. A framework for undertaking research into perceptions of age discrimination in employment



Critical realism is an appropriate research philosophy to use in investigating perceptions of age discrimination in employment as the research into perceptions of age discrimination in employment will need to uncover power and control relations which operate behind the scenes of everyday organisational life (Layder, 1996). Critical realism is an appropriate research philosophy in making the researcher aware of these relations. Research using a Critical realism philosophy will be neither wholly deductive nor inductive but include a high degree of reflexivity. The case study would seem an appropriate research strategy as the strategy is of value in refining theory, suggesting complexities and establishing the limits of generalizability (Stake, 2003) and is appropriate when using a critical research philosophy. Moreover, a feature of the case study is that the case is analyzed in-depth in its natural setting, whilst recognizing both its complexity and context (Punch, 2005). In undertaking research into perceptions of age discrimination in employment, it is important to use a mixed-methods approach, utilizing both qualitative and quantitative data. Whilst certain measures can be tested via quantitative means, such as the number and percentage of older workers employed in the workplace and managers' perceptions of older workers, as much age discrimination is subtle and indirect, qualitative research methods are necessary to uncover underlying attitudes, beliefs, stereotypes and employment practices. Moreover, it is important not to rely solely on quantitative data as this may represent "surface meaning" which may be potentially misleading (Benton and Craib, 2001).

This paper has discussed demographic changes in Europe, the nature of ageism and age discrimination in employment and some key findings into research on perceptions of age discrimination in hotel employment in the UK and the Republic of Ireland. The paper concluded with a discussion of the major issues in undertaking research into perceptions of age discrimination in employment and presented a framework for undertaking research in this area. In undertaking research into age discrimination in employment a holistic approach is needed where old age is not seen solely as a biological fact but also a cultural fact (de Beauvoir, 1996).

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