

Older workers and employment: managing age relations

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ABSTRACT

This article reports the findings of research into the functioning of companies' and organisations' internal labour markets. Four case studies of Australian and United Kingdom public and private sector organisations have been undertaken with two principal aims: to elucidate the challenges and barriers to the employment of older workers, and to demonstrate the benefits to business and to older workers of age-aware human resource management policies. In each of the case-study organisations, age-related assumptions affected the management of knowledge and skills and the ways in which older and younger workers were employed. Managing age relations in organisations requires an understanding of the ways in which workers of different ages are perceived and how these associate with sub-optimal deployment. The article concludes by suggesting that policies directed at older workers alone will ignore the age and age-group dynamics that pervade workplaces. To promote the better deployment of younger and older individuals in rapidly transforming organisations, there is a need for policy makers, employers and employees to be attentive to the age-group relationships that currently inform workplace practices. Organisations cannot ignore these age dynamics, but should adopt 'age aware' rather than 'age free' practices. The recommended human-resources approach would attend to individuals' capabilities and not stereotype them by age.

KEY WORDS – older workers, employment, organisations, age-stereotypes, age-group mix and relations.

Introduction

As the labour force ages, academics and policy makers are paying increasing attention to the situation of older workers in national labour markets and in company, organisation and workplace settings (Glover and Branine 2001). Recent studies have examined the attitudes and practices of employers towards older workers, and shown the persistence of widespread age-stereotypes. A widely shared limitation of these studies, however, is

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that they understate the complexity of the interaction of age with other organisational factors, partly because they focus on 'older workers' at the expense of wider 'staff deployment' or 'human-resource management' considerations. The purposes of the research reported here were: first, to explore the benefits and challenges offered to organisations as their workers age; secondly, to analyse the inter-age dynamics at the workplace; and thirdly, to develop policy and practice recommendations for government, employers and other stakeholder groups.

The research collected qualitative data on deployment processes in four companies and organisations in Australia and the United Kingdom, which provided a dynamic, cross-national comparative perspective on age-mix and profile issues. While the projects were separately commissioned and funded in the two countries, the approach, design and methodologies were developed collaboratively, and the two teams worked closely during the fieldwork, data analysis and interpretation phases.

Employers' attitudes towards younger and older workers

Despite the promotion of age-friendly workplace policies by both the Australian and British governments (Taylor 2002; Taylor, Encel and Oka 2002), research over many years has shown that widespread age discrimination continues to affect older workers' deployment, job security, promotion and retention (McGoldrick and Arrowsmith 1992, 2001; Itzin and Phillipson 1993; Taylor and Walker 1994; Arrowsmith and McGoldrick 1996*a*; Victorian, South Australian and Western Australian Equal Opportunity Commissions and the Australian Employers' Convention 2001). Several recent British studies have asked managers to evaluate the attributes of older workers. A 1997 telephone survey of personnel managers found that many (30%) regarded older workers as being difficult to train, unable to adapt to new technologies (34%), and too cautious (36%) (Hayward *et al.* 1997). More positive attitudes towards older workers were also found, however, for they were thought to be more reliable than younger workers (79%), to be relatively productive (83%), and to offer a good return on expenditure (84%).

A survey of a nationally representative sample of United Kingdom employers by *National Opinion Polls Social and Political Research* between 1999 and 2000 found that the perceived strengths and weaknesses of 'older' and 'younger' workers were reflections of each other or mutually constructed (Goldstone and Jones 2001). The positive attributes of younger workers included the ability to deal with change and the possession of good computing skills, health and strength, while the frequently mentioned

weaknesses of older workers were resistance to and difficulties with adapting to change, and poor health, fitness, stamina and computing skills. Another British study, of the managers of a major retailer, found that positive ‘qualitative’ or motivational attributes were more commonly ascribed to older workers, *e.g.* service, pride in the job, cheerfulness and reliability, whereas ‘quantitative’ strengths tended to be ascribed to younger workers, *e.g.* fast pace and acceptance of both training and new technology (Arrowsmith and McGoldrick 1996*b*; McGoldrick and Arrowsmith 2001).

The views held by younger workers towards older workers (and *vice versa*) have also been examined. A survey of 2,000 staff in 20 UK organisations found evidence of tensions between the age-groups, with over one-quarter of those aged 30 years or less stating that they had difficulties telling older staff what to do, whereas only seven per cent of those aged 40 or more years reported problems working for someone younger (Austin Knight UK Limited 1996). Australian quantitative research has also shown that older and younger workers are often perceived as having different attributes linked to age. A survey by Steinberg *et al.* (1994) of 520 employers across major industry sectors found that a majority (55%) considered that older workers were more reliable, loyal and dependable than younger workers, while 74 per cent believed that younger workers adapted more easily to new technologies. Another study asked over 1,000 employers to state the attributes of people that they preferred to recruit, and reached the contradictory conclusion that there was ‘no clear pattern whereby employers favoured the characteristics typically associated with either older or younger workers’ (Bittman, Flick and Rice 2001: 43).

Overall, the findings of previous research suggest that the relationships between managers’ ascriptions of the capabilities of older and younger workers and staff deployment policies and organisational behaviour are complex and variable. Yet, our understanding of the ways in which workers of different ages are perceived and inter-relate in organisations remains embryonic. Some recent qualitative research has increased understanding (*e.g.* Taylor and Walker 1998), but most studies have relied on attitudinal surveys of managers carried out at one point in time, while studies of interactive processes in internal labour markets have been rare. The relationships between age groups and the presence of age-related assumptions have yet to be revealed in qualitative research on workplace processes.

The management of employees’ ages in organisations

While much research has examined age-related stereotypes among employers, their role and influence on company workforce policies and

practices and on the experiences of older workers has been difficult to substantiate. One view is that companies' policies are indirectly determined by community norms, representations and stereotypes of younger and older workers (Farr, Tesluk and Klein 1999). Another organisation-based perspective is that the attitudes and assumptions held by senior and middle managers towards older workers determine whether and how policies and practices are implemented (Itzin and Phillipson 1993).

According to Lyon, Hallier and Glover (1998: 57), strategic human resource management (HRM) theory, which stresses the need to align strategic business planning with HRM to achieve worker flexibility, organisational commitment and the retention of a 'core' workforce, 'can be seen to amplify older workers' problems by reinforcing ageism in management thinking through the provision of a commercially appropriate rationale which embellishes existing stereotypes and doubts about the commitment of older workers' (1998: 58). The term 'age management' refers to the specific dimensions by which human resources are managed within organisations, but more generally also to the overall management of an ageing workforce (Walker 1999). 'Age management' may explicitly focus on older workers or occur according to inexplicit cultural assumptions. Without specific attention to age group dynamics, however, unintended consequences can result which may lead to the sub-optimal utilisation of human resources. This paper proposes that the management of an ageing workforce requires awareness of the realities of the inter-relationships between workers of different ages, including both the intended and unintended consequences.

The policy context

Driven by the perceived imperative of the need for cost containment in response to population ageing, the Australian government is increasingly adopting new policies that promote the increased participation of older workers (Brooke 2003). The *National Strategy for an Ageing Australia* identified that 'Australia cannot afford not to remove barriers that inhibit ongoing participation in the workforce by skilled workers regardless of their age' (Commonwealth of Australia 2004a). A recent policy statement in a Treasury paper, *The Inter-Generational Report*, advocated extending the participation of male workers aged 55–70 years by 2.5 percentage points to 59.5 per cent by 2025.¹ A February 2004 policy document, *Australia's Demographic Challenges*, reaffirms this commitment and recommends policies for changing superannuation regulations to enable phased work and retirement (Commonwealth of Australia 2004b). Australian states

already have legislation that proscribes age discrimination in employment, and federal government legislation is currently under development.

The employment of older workers is also high on the British policy agenda. The barriers to older workers' employment have been recognised in numerous recent official reports and policy statements (*e.g.* Performance and Innovation Unit 2000), and the UK government has launched various initiatives to raise awareness among employers, and to provide them with the tools to tackle age barriers. One example has been to debar age limits in job advertisements posted in the government's employment exchanges (Job Centres), and the *New Deal 50 Plus* scheme to enable older people to return to employment. The UK government is committed to implementing age discrimination legislation by 2006 under the terms of the European Union *Equal Treatment Directive*.²

Rationale, objectives and methodology

The overall objective of this study was to understand how age and age-group relationships were perceived and managed in the four case-study organisations. The comparative Anglo-Australian dimension enabled consideration of the influence of the different national employment relations environments and legislative frameworks on organisational practices. The case studies involved quantitative analyses of human-resources data, semi-structured questionnaires administered in face-to-face interviews, and focus groups. The study samples of employees and managers included approximately equal numbers of men and women, a broad range of employees' ages, from under 20 years to those aged in the sixties, and different occupational levels, from managers to operatives. In each of the two Australian companies, interviews were conducted with 18–20 people, and focus groups held with 80–100. In the two British organisations, around 25 interviews and focus groups with around 50 people were conducted. The interview topics in both countries included the age distribution of the workforce, individuals' work histories, training and career progression, adaptability to new technologies, skills and training, age-stereotypes, the perceived benefits and challenges of younger and older workers, age-mix and retirement options.

Selection of the case studies

Both research teams had links with employers' umbrella organisations concerned with older workers, the *Australian Employers' Convention* and the UK *Employers' Forum on Age*, which afforded relatively easy access to the case-study organisations. The Australian companies are a national

logistics arm of a major retail chain and a glass manufacturing company. The British organisations are the distribution arm of a major retailer and a provider of further (tertiary) education and vocational training. To some extent the organisations were purposefully selected, although the sample frame selection of case studies was ultimately determined by local factors such as organisational interest and the receptiveness of management to the project.

Age-group tensions in the organisations

Age and the deployment of staff

In both the Australian and UK case study organisations, the introduction of new technologies has influenced how older and younger workers are deployed and therefore the age profiles of the workforce, and these changes have produced tensions. The Australian logistics company was responsible for dispatch for a major national retailing chain. Following the introduction of state-of-the-art scanning technologies, one consequence was that in the section where cartons were identified, sorted and boxed, the work had become heavier and less suitable for the less physically fit. The company reduced the numbers of (mainly women) employed from 230 to 90, and 30 older women had been displaced. The management did not see them as candidates for learning the new technologies. As an older worker commented, 'People who have been here a while are threatened by the new scanning system. ... I'm just an old cow, leave it to the young ones'. Another older worker commented on the support he required for learning new skills: 'I was unsure, uncomfortable and a bit nervous learning something different. It was because of our age. I've never done it before. If someone worked with us on the job for another month until we got the hang of it. Some catch on quick, others not'.

While the ability of the younger workers to work with the new technologies was rewarded by higher remuneration, the 'experience' of other staff in maintaining and improving productivity was equivocally valued. As a young process worker commented, 'The older ones have a lot of experience working with you and even training other people, passing it on. Knowing how things were done in the past is invaluable. As they get older there are similar problems as before, it saves you time'. On the other hand, certain limitations of older workers were recognised, as for instance by a younger worker who reported 'a tendency to revert to past work practices rather than adapt to changes'.

Turning to the Australian glass company, it had started as a partnership of 25 older employees, predominantly glaziers, and at the time of the study

had 222 employees. The older glaziers were recognised not only as the foundation of the business but also as the employees who maintained the quality of its products. Following the introduction of state-of-the-art 'world best practice' technologies, the relatively young operators of the more productive machinery were more highly remunerated than the experienced and predominantly older tradesmen. Several were concentrated in the areas where glass was manually handled, and worked as cutters, edge-bevellers and checkers, but there were few older people on the high-speed laminating production line which required manual inputs.

Changes in the glass industry were accelerating the pace of production and younger workers were prioritised for training in the new glass-processing technologies. The perceptions held of younger workers also clearly influenced their selection for skills development and for training in the new technologies. As a senior manager, in his fifties, commented, 'Older people generally do not work in the toughening plant. Older ones are not so hi-tech [and] a lot of young lads work on computers'. A young middle manager commented, 'Younger workers are predominantly in the furnace area. Six out of seven operators on the new machines are younger'.

Turning to the British case studies, one organisation is a large distribution centre for the mail order and Internet arms of a major retailer. It employs 18,000 staff, many on temporary contracts. Conflicting views existed about the alignment between age and skills required to perform the work. Some respondents thought that the influx of mainly young temporary staff had introduced inexperience and indiscipline, as well as decreased respect for both the management and the company's property. Yet several other respondents held that many of the long-service staff resisted organisational, management and technological changes. One line manager disparagingly depicted older workers as having the attitude that 'we've always done it this way and will continue to do it this way'.

In both countries, the redeployment of older workers to positions using new technologies was impeded by a perception that younger workers were more able to make skills transitions. Such age-bound assumptions, however, led to misalignments between the actual skills required and the age segmentation of the labour force. This led to relatively limited opportunities for skills development among older workers – the perception became a self-fulfilling prophecy.

Age and hierarchy

The deployment of younger workers in supervisory positions over older workers also led to tensions. In the Australian logistics company, some

young managers were perceived by older senior managers as lacking the skills and experience required for their supervisory positions; and they argued that this compromised the team's effectiveness. A senior manager perceived that there were 'three or four teams in which most team leaders were just young kids'. Another asserted that young managers lacked a breadth of knowledge of the business environment: 'The teams (led by young team leaders) make all the decisions, but they are not running a business. They have lost all their corporate knowledge'.

Similarly, the management of the UK distribution centre had a preference for promoting younger workers to supervisory positions over older experienced workers. Several older managers said that there was some way to go before the new (young) incumbents acquired sufficient experience to justify their management roles and to enable them to work to a satisfactory standard. One older operative stated that the company had 'more managers than you know what to do with and ... some are too young to take responsibility'. Another described the new managers as, 'kids with badges on. A lot of the women have been here a long time ... you're getting some little kid who's coming in and getting a badge and more money than them, telling them what to do. They haven't a clue how the firm runs'. The need to manage the relationships between the age groups was also pointed out by a younger worker: 'This [is a] young, dynamic team, but if [the company] doesn't look after your older workforce, it's going to fall flat'.

In both countries, similar patterns of age deployment emerged, as younger workers were promoted to supervisory positions over older workers who were nevertheless seen as more experienced. The resulting tensions impeded the most effective use of all three organisations' human resources. Older workers were excluded from opportunities to train in the new technologies, which affected their career prospects. Where promotion opportunities were confined to the younger employees, the older workers were resentful and tensions between the age groups occurred.

Age and early exit from work

In both the United Kingdom and Australian case study organisations, perceptions about older age and the incapacity to learn new skills induced early exits, some before the formal retirement age, and there were instances of the abrupt loss of expertise. In the British distribution centre, for example, a voluntary redundancy scheme had been taken up primarily by older workers, but was later perceived to have resulted in the loss of considerable skills and experience. Virtually all the older employees beneath management level had been offered redundancy, and the majority took it. The explicit reason given by management was that the firm required 'a

different kind of management and skill set'. Many of the respondents believed, however, that the management should have looked harder at how to utilise the knowledge of the older staff. As one older respondent said, 'They have let all the good ones go' and '[the company has] lost the best staff, experience-wise'.

In the Australian glass company, staff retention strategies had been implemented, albeit unsystematically, by the Chief Executive Officer. He wanted to retain the expertise of the founding 25 members of the co-operative, who had helped build the company into a medium-sized enterprise. His view was that managing the succession and retention of knowledge was the 'organisation's biggest problem', and he actively recruited people aged in the late fifties or older. As he said, 'They have a built-in track record, they get a routine medical check, and they have a wealth of experience in other glass factories'. He also believed that retirement could be reversed, and wanted to bring older people back into the company as consultants because 'it is a minefield today and they have experience of problem solving'. If age perceptions tended to dictate the exit policies of the British organisation, in the Australian glass company the age profile of the staff was managed to preserve organisational knowledge, to increase retention and to encourage the re-entry of older workers.

Inter-age group tensions: a summary

In the three case-study organisations so far examined, skills development in new technologies and broader opportunities for staff development were more likely to be made available for younger workers, and this indirectly influenced the deployment of the older and younger workforce. As a consequence, one characteristic career trajectory was that younger workers ascended the organisational hierarchy despite their limited experience, and they displaced more experienced older workers whose career trajectories consequently reached a plateau or declined. In the British distribution company in particular, voluntary redundancy and retirement was the mechanism for a switch from older to younger workers (sometimes described as generational 'churn'), with the unintended result that skills and experience were lost to the organisation. In both countries, the age-related deployment of workers accompanied transitions to new technologies and created tensions between employees of different ages.

The complementary skills of younger and older employees

The case-study organisations also proactively capitalised on the complementary skills of younger and older employees. Some such practices

were explicit and purposeful, but some were unintended consequences of other measures. The most commonly perceived benefits of mixed-age teams were in mentoring and in raising production. In the Australian logistics company, older workers were explicitly valued for their ‘experience’ when mentoring younger workers. The most frequently identified positive attributes of ‘experience’ were the abilities to work ‘smartly’ and avoid mistakes, to monitor the quality of production, and to stabilise work groups. The most senior manager in the logistics company said that the transmission of experience and expertise from older to younger workers (and *vice versa*) increased productivity:

Older people can teach something to the younger ones – a smarter way to the young. The young people can teach the old new technology. They are much more computer literate and they have a different attitude towards work. Older people’s work ethic rubs off on the younger blokes and I think it is a good thing.

Another manager valued the older workers’ contribution to stability in an age-mixed environment:

This distribution centre is a very stable place because of the mix of staff. If one bloke follows on, the rest do. There are diverse age groups and a gender mix. It’s not a militant working place. They bounce off each other and that makes for a more stable environment. You need the variation in ages to get the stability.

In the glass company, there was similar recognition of the advantages of integrating older and younger workers. An older forklift-truck driver’s prescription was, ‘put younger workers with experienced people who could explain things. It’s a benefit to both sides. The young are good to work with and make you feel younger. Older people are willing to listen while the younger are pig-headed and they think they know everything’. In the British distribution centre, the view of a manager was that older workers were easier to work with than young workers and imparted a sense of responsibility to mixed-age work groups: ‘They get the job done, they’ve got the right respect, you know you can leave them on their own, the job’s going to get done, it’s going to get done right, and they’re not going to spend too long chatting to their mates, in the brew [tea] room or whatever’.

There was a contrasting view in the fourth case study organisation, the British further education college where, by contrast, the value of inter-age mentoring did not appear to be recognised, and was happenchance if it took place at all. Many of the older respondents at the college reported that they had better teaching skills than the younger staff, through their confidence and ability to handle large classes and difficult students. One lecturer maintained that while a person might lose some vitality with age, this was balanced by experience and insight. In his view, these abilities

should be recognised by giving older staff the option of working fewer hours and in different roles, such as mentoring or advising others.

Complementary age-related skills: a summary

While managers in the organisations saw the benefits of age-group complementarity, in none was its promotion an explicit policy; only implicit and *ad hoc* approaches were observed. It was recognised that older workers transmitted knowledge about better ways of working, and that they set and maintained quality standards, and imparted stability to work groups. Yet older workers' skills were concurrently viewed as impediments to the productive utilisation of new technology. Young workers were seen as more productive, through their adaptability to new technology, yet conversely, their more limited experience was accepted as a production risk. In neither country and in none of the organisations were there attempts to bring into the open, and to challenge, the age perceptions that restrained the most effective deployment of the organisation's human resources.

Implications of the findings

This study has illustrated the ways in which age-performance perceptions in organisations influence the age-segmentation of the labour force and generate tensions between different age groups of staff. Age segmentation was often subtle, unacknowledged and even unintended. Many managers used (some unconsciously) age stereotypes in the deployment of the organisation's human resources. Many of these perceptions were not articulated but were covert assumptions, and, at least in some cases, they impeded the optimal deployment of the organisation's human resources. In the Australian companies, issues about the management of older workers had a higher profile than other diversity issues. In comparison with the logistics company, the glass manufacturer was a case of high awareness: the employers saw that the effective use of younger and older employees would promote the ages of the company's business interests. By contrast, in the British organisations, 'age management' was barely on the agenda of the senior managers, except in channelling older workers towards early retirement.

Achieving good age management practices

It has been shown that age was a strong influence on both staff deployment and the allocation of training. Yet the organisations tended to lack

age awareness or strategies to integrate workers of different ages. Effective 'age management' requires auditing human resources data, identifying and challenging age stereotypes, and reviewing age-related deployments. Myths concerning age need to be exposed to prepare for new practices. Age management also needs to pursue practices that optimise age-group mix and skills succession and replacement (an 'inter-generational' workforce development approach). The perception that older people lack the capabilities to learn new technologies leads to their exclusion from re-training, the obsolescence of their skills, plateaus in their careers, and early exits. Active age-profile strategies could, for example, include giving older workers skills in new technologies and giving younger workers more diverse experience. Age audits may expose the under-representation of older workers and the need to build up their number in response to labour shortages. Constructing age-mixed teams and introducing performance-reward systems which recognise cross-age combinations of skills and capabilities should be tried. Such systems should focus on individual capacities and transcend age-bound stereotypes.

The stakeholders' responses

Effective age management ultimately requires policy makers in government, professional organisations and unions to work collaboratively, as well as employers and employees. Government policies should encourage business organisations to develop age-aware policies. Success in this will require appreciation of the tensions (and complementarities) in managing workers of different ages. The findings of this study strongly suggest that in developing age-management policies, policy makers need to consider inter-age relations, or the issues concerning the mix of young and older workers or 'age diversity', rather than just the interests and utilisation of so-called 'older workers'.³

Anti-age discrimination legislation is the first step favoured by governments, but does not necessarily expose the age perceptions that are the foundation of discriminatory practices. The findings of our case studies have revealed that age-segmentation is partly based on unconscious prescriptions of the functions of staff of different ages and can impede production. The challenge is to face up to the realities of organisational life and to the intractability of age-stereotypes. The ways in which age-stereotypes block apparently progressive policies need to be examined. A British example is to combat the lip service that is paid to life-long learning for older workers, which coexists with the stereotypical views about older workers' lack of adaptability to new technologies that

restrict their opportunities to develop their skills (see Taylor and Urwin 2001). In Australia, the take up of a government bonus for people who work beyond 65 years of age has been greatly under-subscribed. These instances suggest that, without close examination of the complex factors that guide demand-side staff deployment, well-intentioned policies will not work.

It is in employers' interest to make the best use of their employees of all ages, and to manage the tensions that technological and organisational changes produce between various age groups. Managing age in organisations ideally involves establishing performance systems which reward individual capacities, a difficult task given the age-related assumptions which pervade most organisations. This will increasingly involve managing the transitions to retirement in ways that do not disadvantage older workers. This in turn requires that employers proactively identify the ageism that shapes their deployment practices.

Conclusions

In trying to reform organisations' employment practices, policy makers have given insufficient attention to the realities of how age operates in organisations: the normative and prescriptive rhetoric and policies have developed faster than evidence-based knowledge. It is particularly important to develop our understanding of the ways in which age perceptions affect age-group relations, and of how best to manage the complementary skills of staff of different ages and experience. Ideally, organisations should deploy employees in accordance with their individual attributes and capacities rather than by making assumptions based on age. Without confronting age perceptions in organisations, anti-discrimination government policies will have little traction. 'Age awareness' needs to replace both stereotypes and 'age blindness'. The end point is to realise individual capacities through 'age-free' practice, yet currently this remains an ideal and remote aspiration.

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NOTES

- 1 Several policy documents in the field adopt the terminology of ‘generations’ and ‘generational change’. This is problematic: in any company or workplace, most employees will not be tied by inter-generational relationships, and among those who are, a 20-year-old may be the grandchild of a 60-year-old. The usage preferred in this paper refers (maybe at times inelegantly) to ‘age-group’ not ‘inter-generational’ dynamics or relations.
- 2 For more information, visit the United Kingdom government ‘Age Positive’ web site: <http://www.agepositive.gov.uk>
- 3 This has been recognised in the UK Department for Work and Pensions’ guidance publication, *Age Diversity at Work: A Practical Guide for Business*. Available online at <http://www.agepositive.gov.uk>

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