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Subtyping Ageism: Policy Issues in Succession and Consumption

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Abstract

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Ageism research tends to lump “older people” together as one group, as do policy matters that conceptualize everyone over-65 as “senior.” This approach is problematic primarily because it often fails to represent accurately a rapidly growing, diverse, and healthy older population. In light of this, we review the ageism literature, emphasizing the importance of distinguishing between the still-active “young-old” and the potentially more impaired “old-old” ([Neugarten, 1974](#)). We argue that ageism theory has disproportionately focused on the old-old and differentiate the forms of age discrimination that apparently target each elder subgroup. In particular, we highlight the young-old’s plights predominantly in the workplace and tensions concerning succession of desirable resources; by contrast, old-old predicaments likely center on consumption of shared resources outside of the workplace. For both social psychological researchers and policymakers, accurately subtyping ageism will help society best accommodate a burgeoning, diverse older population.

In the spring of 2011, the New York Yankees faced a problem—indeed unusual for professional sports’ most successful franchise. After their most recent stretch of dominance—with a core group of recognizable and popular players—two were suddenly showing their age. The first, 36-year-old star shortstop Derek Jeter, was in the midst of a historically poor start; this came on the heels of a series of contentious off-season contract negotiations, in which Jeter’s desire for a sizeable contract extension clashed with the team’s perception of his declining performance. Slumping even more greatly was 39-year-old perennial All Star catcher Jorge Posada, himself entering the final year of his contact with the team. Things got so bad that he finally was assigned to the last position in the batting lineup—a move Posada took as a grave insult and worthy of withdrawing himself from the game before it started. This highly-publicized incident almost led the Yankees to release the catcher from the team altogether; pundits’ accusations of pouting soon followed, characterizing Posada’s behavior as a selfish denial that he was way past his prime ([Baker, 2011](#)).

For both Jeter and Posada, these incidents threatened sudden, heartless ends to distinguished careers. Though in lifespan terms each is barely middle-aged, in baseball spheres their ages signify near-retirement. As such, the parallels between the so-called “Posada problem” or “Posada drama” ([Matthews, 2011](#)) and the broader arena of succession planning in the American workplace have not gone unnoticed. Numerous American pundits and media outlets have described the delicate challenge of dealing with expensive older employees—or as *The New York Times* describes it, “easing out the

gray-haired” ([Schwartz, 2011](#)). On one hand, companies must be sensitive under such circumstances, if for no other reason that to maintain a sense of morality in their “organizational culture” ([Waters & Bird, 1987](#)), not to mention age as a legally protected status. On the other hand, even if older employees are performing well, they may not, in the companies’ eyes, be worth the cost of their salary. The awkward ambiguity between these two sides of the coin raises real questions about what constitutes age-based discrimination, versus utilitarian decisions geared toward maximizing profits.

Although social psychology has much to say about stereotyping and prejudice, the field would also have difficulty in ascertaining this particular form of age discrimination, because the targets do not fit the typical profile of old age. That is, [Robert Butler’s original \(1969\)](#) definition of ageism as a “systematic stereotyping of and prejudice against people because they are old” does not fit quite well in these contexts, seeing as many older employees still possess many of the same abilities that made them valuable to their employers in the first place. Nevertheless, much as a rapidly growing older population is forcing society to re-think how it should treat its senior members, it should also impel social psychologists to ponder different ways of characterizing older age, and resulting forms of discrimination.

Thus, this paper reminds both social psychologists and policymakers of the importance of “subtyping” ageism, in light of new conceptual approaches that identify disparate issues and relevant stereotypes. We first summarize social psychology’s delineation of social group subtypes, focusing on [Bernice Neugarten’s \(1974\)](#) important distinctions of the “young-old” versus the “old-old.” Applying these divisions to age-based prejudice, we delineate Western social psychology’s predominant focus on the old-old in ageism theory and research, reiterating the lack of explanation for prejudices faced by the young-old. We then posit the disparate forms of age discrimination that target these diverse elder sub-categories, emphasizing the unique tensions of succession that more often affect the young-old and those of consumption that affect the old-old. Extrapolating these arguments to policy, we put forth suggestions to bear in mind when crafting social policies to accommodate the young-old and old-old, including the potential cross-cultural disparities in doing so. Ultimately, we recommend considering elder subtypes in contemplating age-based prejudice and discrimination—particularly the relatively neglected young-old.

Elder Subtypes: Young-Old versus Old-Old

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Perhaps more than some other fields, social psychology has long been aware that not all people fit neatly into traditional categories. With this in mind, researchers have identified various *subtypes* that represent people’s sub-categorizations of conventional social groups. Examples span diverse groups, including males (e.g. intellectual, bum), females (vamp, housewife; [Eckes, 1994](#)), gay men (flamboyant, activist; [Claussell & Fiske, 2005](#)) and lesbians (career-oriented feminist, angry butch; [Geiger, Harwood, & Hummert, 2006](#)). These distinctions take into account the within-category nuances that many recognize but are nevertheless ignored by traditional broad social categories.

It was [Neugarten \(1974\)](#) who first identified subtypes of older people. Though her paper is over three decades old, her description of older age’s evolution is surprisingly applicable today. Her 1970s depiction of the *young-old* comprised people aged 55 to 75, with some degree of affluence, health, education, political activeness, and freedom from traditional familial and work responsibilities. (Notably, this latter point may not apply as much today with older people maintaining employment later in life, as we discuss later.) This depiction was in contrast to that of the old-old, who were less active and predominantly retired. Moreover, according to Neugarten, the young-old should find new ways of maximizing opportunities for self-enhancement and community participation, rendering them potential “agents of social change in creating an age-irrelevant society” (p. 187).

Although Neugarten's specified age bracket may be changing with an ever-increasing lifespan, this optimistic take on the young-old reflects what many social pundits now observe with the current baby boomer generation. In many ways, the current young-old greatly resemble past middle-agers in their health, wealth, and influence (e.g., [Broder, 2007](#); [Keister, 2000](#); [Williams, 2007](#)). The young-old population's rapid growth, its implications for social change, and the potential for an outright redefinition of older age is one of the running themes of [Ken Dychtwald's \(1999\) *Age Power: How the 21st Century Will Be Ruled By the New Old*](#). Indeed, the phrase "60 is the new 40" has become a rallying cry for the young-old, who for the first time find themselves free of many responsibilities but still healthy enough to enjoy their freedom and put it to good societal use ([Bogert, 2010](#)).

Despite widespread knowledge that the notion of aging may be changing, social policies lag behind. The official designation of "senior citizen" still refers the population over 65 (or sometimes as young as 60). In the United States, full Social Security benefits begin at age 66, and Medicare benefits begin at 65 ([U.S. Social Security Administration, 2011](#)). Therefore, in the eyes of Western society, young-old and old-old distinctions currently do not appear to hold much practical importance.

As noted, social psychological investigation of age-based prejudice—the focus of the current paper—similarly tends to group older people together. By and large, ageism theory (delineating causes) has focused on how physical and mental maladies of aging, perceptions of societal uselessness, and diminished status all foster prejudice against elders. Likewise, research on ageism's deleterious effects (delineating consequences) has focused on how ageism causes people to think, act, and behave more slowly. In both cases, this disproportionate focus on old-old-related issues ignores forms of discrimination that uniquely target the young-old, as we elaborate in the next section.

[A Focus on the Old-Old in Social Psychological Ageism Theory](#)

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As a research topic, social psychology has greatly under-investigated ageism compared to racism and sexism ([Bugental & Hehman, 2007](#); [Nelson, 2004](#); [2005](#); [Palmore, 1999](#)). However, even less focus has covered ageism targeting different segments of the older population. Despite lay beliefs that older people are relatively uniform in appearance, attitudes, and health, the older population is actually one of the most diverse. For instance, perceptions of older voters as uniformly conservative and self-interested are gravely inaccurate ([Rhodebeck, 1993](#)). Stereotypically, the kindly "grandfather," the dignified "elder statesman," or the lonely "senior citizen" further highlight sub-components of the older population ([Brewer, Dull, & Lui, 1981](#)). And as we would add, a particularly stark contrast divides the young-old from the old-old ([Neugarten, 1974](#)).

Of Neugarten's two proposed subtypes, ageism theory seems to fixate far more on causes pertaining to the old-old. For example, a common explanation for ageism's prevalence implicates a perceiver's ego-protective motive, protecting against the anxieties associated with death; because the old-old are the closest living reminders of mortality, people are motivated to maintain psychological and physical distance. Terror management theory (TMT, e.g., [Becker, 1973](#)) is a common such approach, positing that people push away reminders of eventual death (i.e., older people) and identify more closely with similar others (i.e., younger or middle-aged people; [Greenberg, Schimel, & Mertens, 2004](#)). A similar perspective is [Snyder and Miene's \(1994\)](#) functional approach to age stereotyping, which implicates ageism as a buffer for the self from the threat of becoming "elderly." These approaches certainly have merit, buttressed by findings that negative attitudes toward death significantly predict devaluation of older adults among younger and middle-aged people ([Collette-Pratt, 1976](#); [Montepare & Zebrowitz, 2004](#)). But these theories do not apply as much to age discrimination targeting the oft-healthy young-old, who do not appear anywhere near-death and should not arouse mortality salience.

Other theories emphasize older people's sheer physical appearance in fostering ageism ([Palmore, 2003](#)). But these perspectives also appear more applicable to the old-old. For instance,

overgeneralization spurs people to mistakenly infer certain emotional states (loneliness, sadness) from physical traits more characteristic of the old-old (droopy eyes, stooped posture; [Montepare & Zebrowitz, 2004](#)). More generally, *negative halo effects* explain ageism as arising because older people are perceived as generally unattractive, and are therefore seen as having negative traits and abilities ([Langlois et al., 2000](#)). Likewise, the concept of *social affordances* centers on how older people's facades (wrinkles, slow gait) signify to children a lack of interaction potential (lack of enthusiasm, introversion; [Palmore, 2003](#)). Each of these age-stereotyping theories highlights the idea that older people may be devalued simply from being perceived to have more repellent bodily "blemishes" than the average person; these uncontrollable, highly visible characteristics parallel other types of stigma as a marked status ([Bugental & Hehman, 2007](#); [Crocker, Major, & Steele, 1998](#); [Jones et al., 1984](#)). But such theories discount the young-old, whose appearance may not nearly represent these alleged blemishes or so much give rise to misguided trait inferences. (We note that teenage sufferers of acne appear relatively let off the hook from a social stigma perspective, but anti-youth ageism is outside our current scope.)

Perhaps even more focused on the old-old are evolutionary explanations for the devaluation of older people. In hypothetical decisions to help, Darwinian cues for inclusive fitness spur favoritism for younger, fit people over older, infirm people, and the healthy over the sick ([Burnstein, Crandall, & Kitayama, 1994](#)). Though not addressing ageism directly, another evolutionary approach to stigma ([Kurzban & Leary, 2001](#)) identifies people who indicate contagion (e.g., frequent illness) and those who lack the promise of ongoing resource-holding as prime targets for social exclusion; predominant perceptions of older people fit the bill on both counts. Disease-related anxieties also inform a similar focus by [Duncan and Schaller \(2009\)](#). But these perceptions would again seem to most nearly target the old-old, and ignore the young-old, who are generally quite active and healthy ([Neugarten, 1974](#)), so they less plausibly provoke those stereotypes.

A broader, socio-evolutionary, *sociofunctional* perspective can also explain ageism ([Cottrell & Neuberg, 2005](#)). According to this theory, people have evolved to live in effective, interdependent groups to maximize group (and consequently individual) success. When certain group members threaten group returns, rejection may ensue. Older people may be perceived as threats in that they cannot as effectively reciprocate benefits from other group members, potentially fostering anger and resentment. However, according to Neugarten's conceptualization, the young-old are quite capable of societal reciprocation, because they often participate in the community, act politically, and work increasingly (characteristics echoed by modern-day baby boomers). Again, this sociofunctional perspective seems to target the old-old more than the young-old.

Socio-cultural accounts of ageism often cite major historical events that caused society as a whole to evolve in ageist ways, but also tend to focus on old-old-relevant perceptions of societal uselessness. For instance, the advent of the printing press improved record keeping and obviated the traditional storytelling, wisdom-sharing role of older people. Additionally, the industrial revolution emphasized mobility and manual labor adeptness, de-emphasizing elders' experience per se ([Butler, 2009](#); [Nelson, 2005](#)). In a related vein, a *social role perspective* on ageism links perceptions of older people with their perceived societal roles—a theory already used to explain beliefs about other social groups (predominately women; [Eagly, 1987](#)). For instance, because many older adults are retired, they might be correspondingly perceived as less agentic ([Kite & Wagner, 2004](#)). These theories help explain a general devaluation of old-old people, and in fact studies do show that an unfortunate but common attitude is that older people are relatively dispensable and societally useless ([Levy & Banaji, 2004](#)). But as with the sociofunctional approach, such attitudes would seem inapplicable to an increasingly active young-old, who are often still employed and evidently contributing to society.

Other theories, such as the Stereotype Content Model (SCM; [Fiske, Cuddy, & Glick, 2007](#); [Fiske, Cuddy, Glick, & Xu, 2002](#)) focus on modern social structure in fostering prejudice, including ageism.

The SCM theorizes that fundamental dimensions of *warmth* (How friendly and trustworthy are this person's intentions?) and *competence* (How well can this person enact those intentions?) form people's perceptions of others. Mainstream society pervasively stereotypes generic older people as warm but incompetent (Cuddy, Norton, & Fiske, 2005). This perception correspondingly fits beliefs of older people in general as non-competitive and low-status (e.g., Fiske et al., 2002). But such perceptions may disproportionately target the relatively inactive elderly, in contrast to the active young-old. Buttressing this, young-old targets can actually face resentment from a rising younger generation if they are perceived as not moving aside fast enough (and therefore competitive; North & Fiske, 2010, 2011, 2012). Taking these points into account, the next section posits the different forms of discrimination that different elder age groups risk facing.

Subtyping Ageism

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Having argued the importance of young-old versus old-old distinctions and portrayed ageism theory's focus on the latter, we now ponder the different forms of discrimination each subtype is likely to face. Overall, as with ageism theory, the majority of research on ageist discrimination's manifestations has focused on plights of the old-old, largely overlooking those of the young-old.

Ageism Predominantly Targeting the Old-Old

As noted, the predominant perception of the pitiful "elderly" old-old is one of high warmth and low competence, or pitifully "doddering but dear" (Cuddy & Fiske, 2004). As a result, ageist behavior toward the old-old often takes a benevolent form, free of ill intent but nevertheless demeaning and deleterious. For instance, much as people treat babies and small children, well-intentioned people unwittingly speak to older people using patronizing, high-pitched "baby talk" and demeaning, exaggeratedly slow and loud over-accommodation in everyday settings (Giles, Fox, Harwood, & Williams, 1994; Hummert, Shaner, Garstka, & Henry, 1998; Nelson, 2005; Williams & Giles, 1998). Likewise, discourse with anti-ageist intent might backfire by actually confirming pre-existing ageist stereotypes (Ng & McCreanor, 1999). For instance, exaggerating a "youthful" old age might have the unintended consequence of rendering naturally occurring aged qualities—such as poor health and frailty—as more deviant (Coupland & Coupland, 1993). Distancing is another common, though more indirect form of ageist discrimination, and includes both physical forms (e.g., placing older people in retirement homes, avoiding places typically frequented by older people) and psychological ones (e.g., emphasizing differences in attitudes and traits between oneself and older people, using derogatory words to describe them; Greenberg et al., 2004). According to the SCM, prevailing stereotype content of the old-old yields corresponding behaviors. High warmth and low competence leads to paternalistic behavioral tendencies that combine active help (protection) but passive harm (neglect; Cuddy, Fiske, & Glick, 2007)—a chilling description of institutionalization. In discussing subtypes of ageism directed at different subtypes of older people, we have no intention to reify ageist stereotypes; indeed, naming them will allow us to confront them.

Such discriminatory behaviors, combined with general societal beliefs about aging, take their toll on the old-old themselves. As a result of receiving over-accommodated speech, they may start to talk, think, and move more slowly (Giles et al., 1994). More generally, many internalize negative stereotypes, becoming more forgetful, sickly, and depressed, partly because they anticipate adopting such characteristics in their later life (Whitbourne & Sneed, 2004), a form of anticipatory socialization. Other older people may suffer less control as a result of ageist institutional practices (Rodin & Langer, 1980). With age, people may adopt self-fulfilling prophecies about failing memory, cognitive confusion, physical frailty, and even cardiovascular responses to stress (e.g. Levy, 1996; Levy & Leifheit-Limson, 2009; Levy, Zonderman, Slade, & Ferrucci, 2009). While it is true that as people age they face cognitive declines in fluid intelligence (i.e., speed, novelty; e.g., Bugg, Zook, DeLosh, Davalos, & Davis, 2006), ageist stereotypes are disconcertingly difficult to overcome, perseverant even

in the face of stereotype-incongruent behavior ([Cuddy, Norton, & Fiske, 2005](#)) and despite the fact that crystallized intelligence (wisdom) grows with age.

In its worst forms, the discrimination endured by the old-old can take a nasty turn, resulting in financial exploitation or abuse ([Blunt, 1996](#); [Hansberry, Chen, & Gorbien, 2005](#); [Rabiner, Brown, & O’Keeffe, 2005](#)). Together, these all-too-common problems afflict at least 12% of the old-old ([Hansberry et al., 2005](#)). Worse yet, financial abuse most commonly occurs among family members, who compose an alarming 85 percent of the perpetrators ([Gaugler, Leach, & Anderson, 2005](#)). Likewise, one of the most common sources of family conflict is tension over inheritance, “will contests” that often neglect the desires of the testator ([Rosenfeld, 1998](#)).

Previously under-reported, outright elder abuse of the old-old is steadily gaining much-needed attention (e.g., [Lachs & Pillemer, 2004](#); [Pillemer & Finkelhor, 1988](#); [Shugarman, Fries, Wolf, & Morris, 2003](#)). Elder abuse occurs more frequently in nursing homes than once believed ([Payne & Cikovic, 1995](#)), as well as within the family, where older people often keep quiet because they depend on younger relatives to take care of them ([Quinn & Tomita, 1997](#)). As evidence that abuse uniquely targets the old-old, dementia and cohabitation have been cited as particular risk factors ([Brewer & Jones, 1989](#); [Campbell, 2009](#); [Coyne, Reichman, & Berbig, 1993](#)).

More recent work has demonstrated prejudiced beliefs among younger people concerning the old-old’s depletion of resources, or passive *consumption* ([North & Fiske, 2010, 2011, 2012](#)). These prescriptive beliefs emphasize a desire to limit older people’s exhaustion of shared resources (e.g., government money) that allegedly could be best used by younger generations. Prescriptive stereotypes of consumption primarily target the old-old because their predominant low status, noncompetitive societal place dictates minimal usage of the shared resource pool. Thus, when the old-old reap shares disproportionate to their low status (such as when they decide to undergo optional but resource-intensive medical procedures), they come to be perceived as exploitative in the eyes of the young ([North & Fiske, under review; 2010, 2011](#)).

Ageism Predominantly Targeting the Young-Old

Whereas the old-old appear to face discrimination stemming from perceptions of pity, uselessness, or burden, prejudice against the young-old stems more from perceptions of allegedly not knowing when to step aside. As indicated by the Yankees anecdote, a particular ambiguity emerges regarding young-old employees who stave off retirement. On one hand, they are at or near traditional retirement age, which fosters expectations among employers (and younger workers awaiting job opportunities) for these older employees to retire. On the other hand, older workers’ relative good health and often-steady job performance (Posada and Jeter notwithstanding) leaves them little motivation or readiness to quit. Thus, the young-old face discrimination around the notion of *succession*—the ambiguity surrounding when is the proper time to step aside, pass along, and make way for younger generations ([North & Fiske, 2010, 2011, 2012](#)).

From a theoretical standpoint, succession-based prejudice targeting the young-old differs from consumption-based discrimination against old-old, in that the young-old may more often possess considerable enviable resources. In line with Neugarten’s original definition, many young-old people (even those already pensioned) hold an elevated level of health to go along with greater disposable incomes than many younger workers ([Friis, 1991](#)). Indeed, unlike the retired, less active old-old, the young-old are not only highly active, but may have risen to the top of their occupation. Moreover, in the eyes of the younger generation, elders’ postponing of retirement inhibits their own job opportunities ([Scrutton, 1999](#)). Indeed, clamoring from the younger generation for older people to “just retire already” has increased in recent years (e.g., [Quindlen, 2009](#)). When older people fail to pass along their

resources—such as hoarding their wealth—resentment ensues among younger generations ([North & Fiske, under review; 2010](#)).

Unfortunately, from the perspective of employers, highly-paid young-old employees may be deemed too expensive to keep. Companies have long dealt with this delicate issue; indeed, age is a protected category under Title VII of the Civil Rights Act of 1964. But the recent economic climate necessitated increased tough, practical choices regarding aging employees. Such decisions have given rise to an unprecedented growth in age discrimination cases ([Elmer, 2009](#)), forcing policymakers and courtrooms to mull what does and does not constitute age-based prejudice. The more heartless (or purely economics-oriented) pundits argue that under a capitalist society, cutting out expensive older employees is the best way for firms to thrive (e.g., [Berman, 2009](#)) and that the line between discrimination and savvy, cost-effective business practice is thin ([Levitz & Shishkin, 2009](#)).

However, such perceptions are not entirely fair. A recessed economy has saddled the young-old age group with the longest duration of unemployment by a significant margin ([AARP, 2011; Over 50 and Out of Work, 2011](#)), suggesting that clinging to one's job is a prudent move. Other practicalities justify delayed retirement. Claiming Social Security benefits before full retirement age permanently reduces one's monthly payments by 25% or greater ([Block, 2009](#)). Moreover, the average amount of 401(k) funds held by near-retirement workers is only about \$98,000—well below the recommended \$250,000 amount needed to maintain an adequate standard of living for the rest of their lives ([Geoghegan, 2011; Klein, 2010](#)).

Notwithstanding the predominant research emphasis on old-old ageism, some research has elucidated workplace ageism as a dire problem for the young-old. For instance, despite considerable research indicating that job performance does not decrease with age (e.g., [Cleveland & Landy, 1983; Liden, Stillwell, & Ferris, 1996; McEvoy & Cascio, 1989](#)), evidence indicates that young-old job applicants are rated less positively than younger ones, even when similarly qualified ([Avolio & Barrett, 1987; Saks & Waldman, 1998](#)). Common beliefs about older workers include that they are inflexible, resistant to change, slower to train, lack technology skills, and have more health problems compared to younger workers ([Loretto & White, 2006; Magd, 2003; Maurer, Wrenn, & Weiss, 2003](#)). Although some of these perceptions may have a degree of merit (fluid intelligence does decline with age, inhibiting the learning of novel tasks such as new technologies; e.g., [Bugg et al., 2006](#)), they are often exaggerated or completely unfounded. Moreover, such preconceptions overlook the numerous benefits of older workers, who tend to be more motivated, cheerful, dependable, loyal and prideful of their work than their younger counterparts ([Brooke & Taylor, 2005; Hassell & Perrewé, 1995](#))—not to mention offering considerable wisdom and experience.

Compounding the problem, these prejudicial feelings often yield discriminatory practices that are quite subtle. For example, a common rationale for companies laying off, demoting, or denying promotion to young-old workers involves an alleged need for “new blood” ([Cardinali & Gordon, 2002](#)). Subtle bias also appears in job ads, such as job descriptions involving “fitting in with a young team,” and seeking “employees who are young and keen enough to revel in the pressures and excitement” of the job ([McGoldrick & Arrowsmith, 1993](#)). Subtle ageism targeting the young-old parallels other, indirect forms of prejudice. For instance, modern or “symbolic” racism characterizes subversive forms of racial discrimination that occur just below the surface, encapsulated by statements such as “Irish, Italian, Jewish, and many other minorities overcame prejudice and worked their way up; Blacks should do the same.” ([Henry & Sears, 2000](#)) Much as symbolic racism differs from more direct, “old-fashioned” racial bigotry ([Gaertner & Dovidio, 1986](#)), subtle ageism against the young-old contrasts with more explicit, socially condoned bias against the old-old (e.g., [Nelson, 2004](#)). Older employees' furtively blocked career progression represents a “silver ceiling,” analogous to the proverbial glass ceiling faced by female workers ([Redman & Snape, 2002](#)).

The subtlety of young-old workplace discrimination has made age bias historically difficult to prove in court. Apparently lending a hand to older workers, a major Supreme Court ruling recently preserved the right for workers to challenge subtle forms of age bias ([Smith v. City of Jackson, 2005](#)). However, this step forward was mitigated by a more recent decision, which forced older workers to bear the full burden of proof that age is the primary factor in a dismissal or demotion ([Savage, 2009](#)).

Either way, the recent recession has begun to bring young-old, succession-based issues to the forefront of policy, making salient the limited number of available jobs. As a result, debates about mandatory retirement have intensified, spanning a variety of professional fields, from neurosurgery and gastroenterology, to aviation and the judiciary, and even to academia ([Day, 2009](#); [La Corte, 2009](#); [Scarraw, Linskey, Asher, Anderson, & Selden, 2009](#); [Thomson, Bernstein, & Leddin, 2008](#); [Wilber, 2007](#)). We will further discuss mandatory retirement in the next section, along with issues in making policy decisions for both the employed and retired older population.

[Policy Implications: Mitigating Discrimination Across Subtypes and Cultures](#) [Go to:](#)

The take-home message of this paper is that older age is more nuanced than traditional stereotypes, research, and policy currently suggest. Though numerical age is a useful indicator, it is an imprecise one when it comes to distribution of societal resources and contributive ability. Age-related characteristics are evolving all the time, but social policies seem stuck in the past, uncertain how to accommodate shifting age dynamics (as evidenced by impending Social Security and Medicare crises). Grouping people over a certain age may have made sense half a century ago, but such definitions of “old” are antiquated. They will only become more outdated in the future, given expectations for half the children born since 2000 to live past their 100th birthday ([Tugend, 2011](#)).

With the importance of elder sub-divisions in mind, we highlight important factors in forthcoming policy discussions for the young-old as well as the old-old. In addition, we go beyond our heretofore Western focus by acknowledging potential cross-cultural considerations. Regardless of the specific elder subtype involved or the culture in which they work, policymakers must be sensitive to the needs of all older age groups. They must strive to eradicate the pitfalls of ill-defined societal “roleless roles” ([Burgess, 1950](#)), which plague the older population and shape unfair perceptions of non-contribution.

[Policy issues for the young-old: Considerations in the workplace](#)

A primary domain of importance for subtyping age-based prejudice concerns the workplace. Indeed, a large part of the ambiguity in age discrimination cases lies in the uncertain definition of “old.” Are young-old workers actually past their prime, or at least do they present costs that truly outweigh their benefits? Or do employers’ preconceived stereotypes unfairly categorize older workers as unworthy of much investment and career advancement? Clearly, firms should tailor hiring practices to the abilities of individuals, rather than stereotyping them on the basis of age (e.g., [Brooke & Taylor, 2005](#)). At the very least, recent evidence suggests that age-related cognitive decline—far more characteristic of the old-old than the young-old—has been greatly exaggerated, supporting the urgent need for employers to update their impressions of older workers ([Verhaeghen, 2011](#)).

Unfortunately, when it comes to ageism, forces broader than individual companies are at play. The *New York Times* recently opined that society has historically treated age-bias as a mere “second-class civil rights issue” ([Cohen, 2009](#)), and others have characterized ageism as the “equal-opportunity stepchild” ([Cardinali & Gordon, 2002](#)). Paralleling this, as noted, far less social psychological research has covered ageism compared with other prejudices ([Nelson, 2005](#)). From a legal standpoint, courts are all too often willing to dismiss age discrimination claims on the grounds that the old making way for the young is just a fact of life ([Savage, 2009](#)). And though the legal system prohibits age discrimination in hiring and firing decisions, courts are often much more reluctant to concede evidence of workplace age

discrimination than that involving racism or sexism ([Cohen, 2009](#)). Moreover, as noted, some believe that the entire capitalist system may not be compatible with catering to the needs of older workers.

For these reasons, it is imperative that research elucidate ways in which young-old employees are valuable. Indeed, some speculate that employers simply fixate on more tangible, “quantitative” qualities brought to the table by younger workers, and neglect less tangible, “qualitative” talents offered by older workers ([Arrowsmith & McGoldrick, 1996](#)). Social psychological research corroborates older people’s qualitative aptitude in wisdom ([Grossmann et al., 2010](#)), reasoning ([Tentori, Osherson, Hasher, & May, 2001](#)), emotional stability ([Blanchard-Fields, 2007](#); [Carstensen & Mikels, 2005](#); [Williams et al., 2006](#)), conscientiousness and agreeableness ([Helson, Kwan, John, & Jones, 2002](#)). But employers might not be convinced about the value of these qualities without evidence that they beget practical outcomes.

Nevertheless, shifting age dynamics may leave employers with little choice than to cater more toward young-old employees ([Libby & Taylor, 2005](#)). Firms must face the reality that the supply of younger workers is drying up, and they will be forced to maximize their use of older workers ([Age Concern, 1999](#); [Roberts, 2006](#)). The current tendency to deny training opportunities to older workers is an inherent misuse of resources, unduly weakening the overall skills of company workforces. This is especially so, considering that groups with a mix of ages tend to outperform homogenous groups in certain decision-making tasks ([Charness & Villeval, 2009](#)). Such practices also overlook the possibility that the current young-old, possessing an unprecedented combination of experience, health, and energy, might be the ideal dependable worker that many companies seek.

In some ways, in the United States, older worker layoffs performed in favor of cheaper, younger labor resemble worker layoffs done in favor of cheaper, offshore labor. As such, policies to combat older worker layoffs might have similar goals to those hoping to dissuade company outsourcing. Currently, Democrats are pushing to limit companies’ exploitation of tax loopholes that encourage outsourcing labor to foreign countries ([Rubin & Hunter, 2011](#))—a policy that President Obama has previously endorsed ([McKinnon, 2009](#)). An analogous penalty on companies with a history of “younger worker outsourcing” might present a major step toward assisting the older worker.

Policy issues for the old-old: Considering alternative avenues for contribution

As noted, in contrast to Succession issues targeting the young-old, old-old policy concerns center around passive consumption of shared resources. Current fears center over depletion of Medicare and Social Security, both of which are running out sooner than expected ([Wolf, 2011](#)). The recent recession has only exacerbated consumptive tensions, both in the realm of healthcare (increasingly expensive) and the home (increasingly forced to accommodate aging parents; [Luo, 2011](#)).

At the root of such dilemmas is that the old-old are often perceived—fairly or unfairly—as non-reciprocating, taking more than they give back ([Cottrell & Neuberg, 2005](#)). Seeing as the majority of the old-old are in or near retirement, policymakers should focus their creative energy on developing new kinds of societal roles. Such positions might end up situated outside of the traditional workplace, but nevertheless can be highly contributive and meaningful.

In fact, the concept of retirement itself does not have to be a black-and-white, either-or state. A more nebulous, partial situation might yield premium benefits for both employers and former full-time employees. For example, if near the end of their careers employees were allowed to choose part-time paid employment—in addition to receiving part of their income from a retirement system—they could still play less demanding yet meaningful roles in firms. At the same time, they would be freeing up resources for younger employees to enter.

As one example, the academic distinction of “emeritus professor” allows retirees to have some attachment to the university while not requiring that the university commit full-time resources. Many companies enact a similar practice by allowing retirees to serve as consultants. Although restructuring the institution of retirement is no easy task, the current economic climate may soon necessitate it. Moreover, the importance of fostering agency, purpose and community contribution among the old-old cannot be overstated; increasing empirical and anecdotal evidence suggests that such feelings are integral to quality adjustment in later life ([Hsu, 2007](#); [Perkinson, 1980](#); [Pinquart, 2002](#)).

Naturally, policies accommodating the old-old need not be shouldered by firms only; broader initiatives can make use of the talent, energy, and experience of older individuals. Numerous societal sectors—including schools and hospitals—have already recognized the benefits of dedicated, experienced, older volunteers. Having these extra pairs of hands benefits both sides: institutions reap extra, inexpensive help, while such contributive activities positively impact the old-old’s well-being and longevity ([Harris & Thoresen, 2005](#); [Morrow-Howell, Hinterlong, Rozario, & Tang, 2003](#); [Musick, Herzog, & House, 1999](#)). These well-documented symbiotic benefits have spurred some to propose the formation of a large, effectual “elder corps” to accommodate both the older population and broader society in various domains ([Dychtwald, 1999](#)).

Future policies catering to the old-old need not be limited to the ideas presented here. But broadly speaking, such enterprises should fulfill three practical goals: (1) utilize the old-old’s considerable life-acquired skill set, (2) promote a sense of agency and purpose, and (3) be cost effective. As one prototype, Japan’s Silver Human Resources Centers—essentially senior employment agencies—compensates retirees in exchange for needed general skills labor (e.g. office work, door-to-door services, administration; [Bugental & Hehman, 2007](#)). By fostering meaning and providing a small amount of money in exchange for basic but significant labor, this initiative successfully fulfills all three of the above goals and benefits all parties.

In addition, old-old-relevant policies should be developed with consideration of empirical findings. For instance, as noted research has shown that age significantly predicts wisdom and emotional stability ([Grossmann et al., 2010](#), [Williams et al., 2006](#)); the policymaker’s challenge will be finding the right societal niches that can accommodate these skills (e.g. advisory capacities). Regardless of the specific positions created, if even basic, relatively inexpensive incentives were included—such as office space, advisory board positions, or a basic level governmental funding—this would help reinforce all-too-absent important feelings of agency in the old-old. All told, such initiatives would allow the old-old to retain a degree of (inexpensive but important) status as society’s useful, altruistic helpers.

Policy issues across the globe: Considering cross-culture differences

As noted, this paper has thus far struck a distinctly Western tone. However, seeing as social psychology has a history of demonstrating cross-cultural differences in thought ([Nisbett, 2003](#)), cross-cultural differences might also exist in the realm of age-based prejudice (including subtyping ageism). Researchers and laypeople alike have frequently speculated that Eastern and rural cultures hold their elders in higher esteem. For instance, Erik Erickson argued that Western society’s celebration of independence over interdependence has helped foster the roleless state of retirement that many older people face ([Erikson, Erikson, & Kivnick, 1986](#)). Likewise, studies find evidence of positive attitudes toward older people in rural communities (e.g. [Doherty, Mitchell, & O’Neill, 2011](#)). Given that many cite industrialization and modernization as prime causes of ageism ([Nelson, 2005](#)), people argue that rural, remote locales might find older people’s wisdom and experience more valuable.

As such, policy initiatives to cater to the older population may not necessarily apply universally. In East Asia, a particularly important consideration is the historical tradition of filial piety, or *xiao*—the Confucian ideal that places responsibility on younger people to respect and care for their elders,

especially their aging parents (Ng, 1998). Specific domains of filial piety expectations include making their older family members happy, maintaining contact with them, listening patiently to them, and obeying them (Ng, 2002). Researchers have often linked a historical presence of filial piety with a lack of age-based attitudes toward the old, at least indirectly. For instance, Levy and Langer (1994) found that older Chinese participants outperformed older American participants on a memory task, and found views toward aging and memory performance to be positively correlated. They concluded that cultural beliefs about aging shape older people's degree of memory loss. This interpretation is in line with prevailing notions that Eastern collectivist beliefs foster concern for all people, whereas Western individualism denigrates the old in championing individualism and innovation (Nelson, 2009).

Nevertheless, some empirical evidence does exist for ageism's presence in non-Western, non-industrialized societies. For example, older people in Eastern cultures face the same kinds of stereotypic beliefs (e.g. perceptions of being "doddering but dear"; Chen, n.d.; Cuddy et al. 2009) and discriminatory behaviors (e.g. outright abandonment; Fackler, 2010) as their Western counterparts do. Ageist sentiment apparently exists in rural cultures too, for instance among children (Seefeldt, Jantz, Galper, & Serock, 1977) and experienced geriatric doctors (Gunderson, Tokowiak, Menachemi, & Brooks, 2005). In fact, recent research found that rural, Thai students expressed significantly *greater* negativity toward their elders than American students (Sharps, Price-Sharps, & Hanson, 2006). Further casting doubt on cross-cultural differences in ageism, others cite modernization as a major threat to filial piety's ability to buffer ageist sentiment (Cheung & Kwan, 2009).

Nevertheless, this is a largely (and surprisingly) unresolved empirical issue. What is clear is that the older population is universally increasing, which will require policymakers to come up with practical strategies to accommodate it. Strategies to cope with an enlarged older populace may indeed end up differing by culture; for instance, the Eastern tradition of filial piety may result in some form of legal responsibility for the young to care for the old. From the standpoint of subtyping ageism, the filial piety perspective does not give clear delineation of whether younger people would respect the young-old more than the old-old. However, encouraging evidence indicates that younger people adhere to the doctrine equally for parents and grandparents, despite that fact that the former hold stronger expectations for such adherence than the latter (Liu, Ng, Weatherall, & Loong, 2000). Nevertheless, it will be up to policymakers to be familiar with their own culture and enact policies accordingly.

Conclusion

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Throughout this paper, we have argued that both research and policy have lagged behind demographic trends in understanding age-based prejudice. Psychological research has fixated on characteristics most relevant to the old-old in fostering ageism, whereas policy has anachronistically categorized all people over-65 as "senior." Such conceptions may have effectively captured the nature and needs of older people in the past, but do not adequately enhance understanding of the dynamics of age-based prejudice. Moreover, such definitions ignore the tremendous rise in health, vitality, and activity of the current older population.

Naturally, if policies are enacted to accommodate the older population, they must be done with consideration of their intergenerational implications. For example, concerning the young-old, raising the retirement age might increase elder employment, but could have a similar residual effect as the current recession, which is causing a record number of young people to be unemployed (U.S. Bureau of Labor Statistics, 2009). However, lowering retirement age would interfere with the civil rights of capable older people and might increase unemployment as a whole (Fisher-French, 2009). For the old-old, the creation of alternate roles should utilize a sufficient amount of resources to make these endeavors worthwhile but should not detract too much from younger age groups. In both cases, the main point is that society needs to avoid "age wars" between generations over scarce resources (Longman, 1986; Minkler, 2006). Ultimately, clearer societal paths and increased options for both the

young-old and the old-old would go a long way toward precluding such tensions, as would better awareness of the unique prejudices endured by these disparate elder subtypes.

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