

AGEISM IN THE WORKPLACE – SELECTED RESEARCH RESULTS IN SMES FROM THE POZNAŃ POWIAT

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Abstract

Research background: In recent years a demographic crisis has been observed and the inverted age pyramid is hard proof of that. Due to that one can notice a need for a prolongation of the economic activity of older people. However, it is not an easy task in the case of ageism.

Purpose: The main aim of the article is to find out whether employees in SME from the Poznań powiat experience acts of discrimination due to age.

Research methodology: The article is based on a survey carried out using the CATI and PAPI methods. The research sample consisted of fifty SMEs from the Poznań powiat in the Greater Poland voivodeship.

Results: It can be indicated that older workers in most SMEs (54%) experienced acts of age discrimination, mostly in the form of disregard. However, stereotypes and discriminatory actions have not been considered as the most important barrier to effective cooperation between the older and younger generations. Only 18% of enterprises have thus far implemented the anti-discrimination policy.

Novelty: The originality of the work is in examining whether SMEs take into account the needs of older employees by adapting working conditions to them, especially in the sociological and psychological spheres. Activities aimed at combating stereotypes should be a priority among company managers. The answers to the research questions clearly justify the need for extensive education about old age and aging, as well as the preparation of the elderly for retirement.

Keywords: demographic crisis, stereotypes, ageism, age diversity, age management

JEL classification: J11, J16, J26, J71

Introduction

The global ageing of the world's population and the numerous social and economic challenges that have emerged with it, have been particularly noticeable among theorists and practitioners over the past twenty years. Among researchers representing various sciences i.e. sociology, psychology, gerontology or economics, there is a consensus on the need to take into account unfavorable demographic trends, in the form of aging societies with a simultaneous decrease in fertility, in the management of modern enterprises. Moreover, according to forecasts, this trend will continue for decades. For example, until 2070 in the EU27 the average life expectancy will increase. For men in 2070 it will be 7.8 years more till the age of 86.1 and for women by 6.6 years by the time they reach the age of 90.3. In turn, Polish men will live on average 10.5 years more till the age of 84.4, and Polish women by 7.9 years longer to reach the age of 89.5 years. Moreover, the participation of older people in society will increase between 2016 and 2070. For example, for the EU27, the share of people 65+ in 2016 was 19.5% and 80+ was 5.5%. In turn, in 2070 it will be 29.2% and 12.9% respectively. In the case of Poland, a twofold increase to 33.3% will be observed for the first category, and in the second age range it will be a 4-fold increase to 16.2%. What is more, according to forecasts, in Poland in terms of the share of people 65+ in society will be the second oldest in the European Union, after Greece. Considering the share of 80+ people, Poland will be the fourth with the oldest citizens, after Portugal, Greece and Cyprus (EC, 2018). This situation will not be improved even by the slightly higher fertility rate, which both for the EU27 and for Poland will increase by only 0.3% to 1.80% and 1.71% respectively by 2070. These results still will not allow for a simple replacement of generations in both cases.

Ageing societies are a specific challenge both in economic, sociological and psychological aspects. The first group undoubtedly includes issues such as the unfavorably changing proportion of economically active to inactive people in societies. Now, according to EU data, in Europe there are three working persons per one person at the age of 65+, and in 2070 it will be only two persons. In the case of Poland one can count 4 working people per one senior and in 2070 there will be less than two (EC, 2018). In addition, there are concerns about a decline in GDP, a reduction in budget revenues from taxes and para-taxes, and consequently the collapse of the pension system (Lyons *et al.*, 2018). In the group of sociological or psychological challenges, one can identify potential difficulties in the coexistence of the younger and older generation on the labor market, which are characterized by different attitudes, values or skills. What is more, it is worth noticing in this article, that many studies have confirmed the existence

of the negative perception of old age and aging among Polish society (cf. Halicka, 2004; ARFP 2007, Eurobarometr, 2007; Kędziora *et al.*, 2009; Lenartowicz, 2009; Dziuban, 2010; CBOS 2012, Karpiński *et al.*, 2013; Oliwińska, 2016; Strugała *et al.*, 2016; PARP 2020). Numerous stereotypes about the elderly also contribute to the phenomenon of ageism, i.e., discrimination based on age. All these elements may also have a negative impact on the desire to extend the professional activity of seniors on the labor market, which will be necessary in the event of a progressive demographic crisis (Berkman, Truesdale, 2023).

The above findings became a prerequisite for conducting a quantitative study on a sample of 50 small and medium-sized enterprises from the Poznań poviat. Through its implementation, answers were sought for the following research questions: 1) whether older employees experience age discrimination in the workplace; (2) if so, whether disregarding someone is the predominant form; 3) are discriminatory behaviors the most important barrier to effective cooperation between the younger and older generations and 4) do the analyzed companies have an anti-discrimination policy in place? In the preparation phase of the empirical research, four research hypotheses were adopted. The CATI and PAPI techniques were used to conduct the study.

This article consists of three parts. In the first, the phenomenon of ageism is characterized. The second part presents the research criteria. In the third – the results of the study in the area of ageism are discussed.

1. The phenomenon of ageism

Let us note at the beginning that ageism existed much earlier than when it was given its official name (Świdarska, 2015). In the face of progressive demographic changes, it has found itself particularly prominent in the sphere of interest of researchers from such fields as psychology, sociology or gerontology. The term “ageism” itself was first used in 1960 by Robert Butler, who defined it as “the process of systematically stereotyping and discriminating against people because they are old” (Palore, 1990). Later researchers clarified this concept. For example, Piotr Szukalski recognizes that ageism is a set of beliefs, prejudices and stereotypes that have its basis in the biological diversity of human beings associated with the aging process, which most often concern the competences of older people and their needs. It is worth emphasizing here that a person’s calendar age is used to distinguish groups whose access to various resources is subject to the so-called social control, and the process of this control is commonly recognized as discrimination (Szukalski, 2008).

The genesis of ageism is seen in two basic factors. First, in changing the approach to the issue of age and attributing to it not only positive, but also negative qualities. On the one hand – as rightly notes A. Klimczuk – old age “was perceived as a sign of experience, knowledge, wisdom, contact with supernatural forces, blessing, authority, power, prestige, as well as a time to reap the fruits of life, rest, freedom from temptations and duties” (Klimczuk, 2012). On the other hand, “with the progressing aging process, there is a prospect of a decline in functions such as memory, sexuality or mobility, as well as the appearance of age-related diseases” (Świdarska, 2015). Let us note here that in Poland, according to the survey conducted in 2016 “Attitudes towards the elderly”, almost half of Poles are afraid of: diseases, infirmity and dependence on others (48.1%), being a burden for others (24.4%), poor living conditions and difficulties with supporting themselves (21.5%). In addition, the pejorative perception of old age can also be seen in the identification of this period of life with the feeling of being unnecessary (16.2%) and with loneliness (13.8%) (Adamczyk, 2016). Second, the existence and intensification of ageism is influenced by cultural change. “Consumer culture and the accompanying media message promote the cult of a young, fit and beautiful body specific to modern times, often identifying health with physical attractiveness” (Adamczyk, 2016). Thus, the image of an elderly person is depreciated, and – what is more – this state also has a negative impact on the anticipation of one’s own aging (Palmore, 2015). Moreover – it is worth adding here – that the mentality of the younger generations is also accompanied by a change of customs, moral and ethical norms, which may additionally strengthen the misunderstanding of the needs and attitudes of the elderly, and consequently causes discrimination (Klimczuk, 2012);

Several dimensions of the phenomenon of discrimination are pointed out in the literature. The main ones are as follow:

- a) direct discrimination, which refers to the situation, when a person is treated less favorably than others in a comparable situation because he or she is of a different age;
- b) indirect discrimination, where apparently neutral criteria or conditions are applied equally to all, but specifically affect a particular age group without objective justification;
- c) multiplied discrimination, where acts of persecution occur simultaneously in several fields, e.g., age, gender, race or disability (Woźniak-Hasik, 2007, after Świdarska, 2015).

In addition, the individual and institutional form of ageism is also pointed out by many authors. The first one is primarily related to the system of values, the way of thinking and acting of the elderly. In extreme situations, it can even take the form of gerontophobia, i.e.,

fear of making contact with the elderly, or gerontophilia, i.e., a preference for being in close relations with seniors due to noticing their numerous advantages. In turn, the institutional form is strictly related to the policy adopted by a given public institution, which in a positive way (attributing positive features to old age) or negatively discriminates against older people (judging older people as being worse than the rest of society).

2. Research criteria

In the years of 2022–2023, as part of the scientific project entitled “Age diversity management. Intellectual capital of employees 50+”, a survey was conducted among 50 small and medium-sized enterprises from the Poznań powiat. The basic research problem was to identify to which extent these entities consider the phenomenon of diversity due to age in the management of the company’s intellectual capital. The study also allowed to identify the basic barriers to intergenerational cooperation, including an analysis of the phenomenon of age discrimination.

The selection of companies constituting the research sample was deliberate. The categories for this selection were:

- a) location (Poznań powiat characterized by the largest number of people in a non-mobile age (45–59/64), i.e., 86,268 people, the largest number of unemployed aged 55–59 (12.7%) and aged 60+ (8.2%), as well as one of the highest demographic age rates in the voivodeship (GUS, 2020b; USwP, 2020a; PUP, 2019);
- b) small and medium-sized entities, which are the largest group of enterprises in the Poznań powiat (just behind the city of Poznań), that is why their condition and prospects for further development most clearly illustrate the potential of entrepreneurship, innovation and competitiveness) (SWW, 2020);
- c) section C according to PKD 2007 (it is classified as one of the key industries of the Wielkopolska Region and is developing the strongest in the Poznań powiat) (Dąbrowska *et al.*, 2019);
- d) employment of a minimum of 4 people up to 50 years old and a minimum of 4 people over 50.

Based on the analysis of data from the Statistical Office in Poznań and considering the criteria assumed in the project, a group of 362 entities was distinguished. Fifty companies (32 small and 18 medium-sized) agreed to participate in the study, conducted with using the

CATI and PAPI techniques.¹ The basic research tool was an interview questionnaire consisting of 24 questions (single and multiple choice questions, some questions rated on scales). There was a need to introduce proper definitions of: age, elderly person, diversity, stereotype, ageism.

Most respondents (64%) were employed in small businesses. The average respondent was 55.9 years old. The surveyed people are mostly men (64%), 80% of all respondents are characterized by incomplete or full higher education, and their average total work experience is 30.2 years. Most often, respondents describe their health as “good” or “very good” (78%).

3. Age discrimination – selected research results

The basic premise of the study was the statement that the phenomenon of ageism may be one of the basic barriers to effective intergenerational cooperation in an enterprise, and consequently may lead to disturbances in its functioning. Treating seniors as a less important group may contribute to the marginalization of their problems in the individual, social, psychological, health or economic dimension (Urbaniak *et al.*, 2015). Therefore, in the study an attempt was taken to verify i.e. the following research hypotheses:

- H1: Older employees from the Poznań district experience age discrimination in the workplace.
- H2: The predominant form of discrimination against the older generation is being disregarded.
- H3: Discriminatory behavior is the most important barrier to effective cooperation between the younger and older generations.
- H4: The anti-discrimination policy is implemented in the majority of the surveyed companies.

In order to verify the first and second research hypotheses, the interview questionnaire included a question, whether the respondents of the study experienced age discrimination, and if so, in what form (possibility of multiple choice). The collected answers of the respondents obtained are shown in Figure 1.

¹ CATI (Computer Assisted Telephone Interview) is a research technique thanks to which one can conduct phone surveys; an interviewer administers a questionnaire to the respondent by reading it on a computer during a phone call. In turn, PAPI (Paper and Pencil Interview) is a research technique for conducting in-person interviews. The interviewer reads questions and records the responses on a printed-out questionnaire.

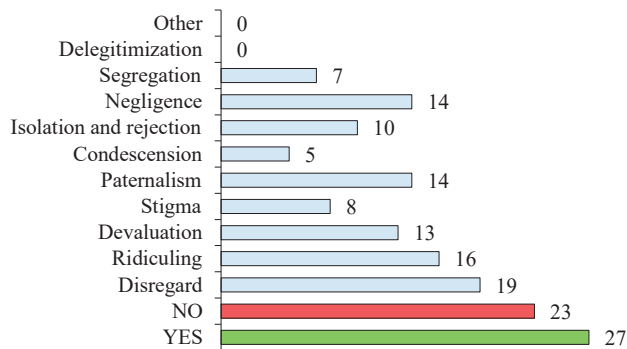


Figure 1. Discrimination and its forms in companies

Source: own elaboration.

In the chart one can notice that 54% of respondents admitted that they had experienced acts of age discrimination in the workplace. This allows for the assumption of hypothesis number 1. In addition, respondents indicated that its dominant form was disregard, understood as the opinions, values or needs of older people are less important than those of other company employees (19 indications), which also allows for the confirmation of hypothesis number 2. What is worth adding here, the second most common manifestation was ridiculing, and the third – negligence, i.e., conscious or unconscious omission of the needs of older employees and paternalism expressed in the tendency to relieve older workers in performing various activities even when there is no real need. It should be added here that the phenomenon of discrimination against employees should be taken seriously by the company's managers since it reflects the existence of negative social capital. This can unfavorably affect the social potential of seniors and intensify their passivism, caution, distance and even alienation. In addition, "lower subjective potential has a negative impact on the ability to creative, innovative self-transformation" (Matysiak, 2006). It may result in a state when seniors will begin to be characterized by passivity and dependence on the environment. As M. Straś-Romanowska notes, older people may show "low, compared to young people, motivation of achievements and low self-confidence, while increased need for peace and security, as well as a high level of fear of loneliness" (Straś-Romanowska, 2007). It is noticed that stereotyping may consume a senior's mental energy (Emile *et al.*, 2015). It is not optimistic that at the same time 48% of respondents admitted that the management of companies shows too little care for respecting the rights and differences of others (attitudes, views, age, etc.).

In view of the numerous unfavorable consequences of age discrimination mentioned in the literature, the author of the research tried to check whether ageism is the most important barrier to intergenerational cooperation. Therefore, in the survey a question appeared about the barriers that prevent the effective cooperation of young and old employees. The respondents were asked to rate 25 barriers (it was also possible to put their own answer) on a 5-point Likert scale. Table 1 presents the group of all barriers mentioned in the questionnaire.

Table 1. Barriers to cooperation between the older and younger generations

Barriers to cooperation	Median	Arithmetic mean	Mode
Competence gap	3	2.98	3
Technological gap	4	3.44	4
Too little experience	5	4.30	5
Lack of respect	4	4.10	4
Missing data	4	3.82	4
Lack of flexibility	4	3.60	4
Lack of time	4	3.70	4
Competition, different needs of the parties (conflict of interest)	4	4.15	4
Lack of a sense of fair treatment (discrimination based on age)	4	4.17	4
Professed system of values (conflict of values)	5	4.06	5
High individualism	4	3.96	3
Lack of trust	3	3.50	3
Reluctance to share knowledge	3	2.80	3
Stereotypes about the older generations	4	4.44	5
Different way of implementing a task	4	4.11	4
High sickness absence	3	2.80	3
Lack of opportunity to build own career path	4	3.69	3
Lack of identification with the company's goals	4	4.13	4
Low employee loyalty/high level of leaving the company indicator	3	3.41	3
Low awareness of managers regarding the need for age management	4	4.03	4
Bad organizational structure	4	4.11	4
Management style	4	4.06	4
Inability to integrate employees into teams	2	2.38	2
Inability to integrate employees outside the workplace	1	1.87	1
Other?	—	—	—

Source: own elaboration.

On the basis of the obtained data, three dominant obstacles can be identified here, i.e. 1) too little experience ($m_e = 5$, $d = 5$, $\bar{x} = 4.30$); 2) stereotypes about the older generation ($m_e = 4$, $d = 5$, $\bar{x} = 4.44$) and 3) professed system of values (the so-called conflict of values) ($m_e = 5$, $d = 5$, $\bar{x} = 4.06$).² These results allow for the rejection of hypothesis number 3. It is worth emphasizing, however, that the first dominant barrier is not easy to eliminate immediately, because experience and related skills require long and hard work. It is natural that the younger generation will not have as much professional experience as the older generation. However, a large role in this respect can be attributed to the top management of enterprises, which by using for example mentoring, shadowing and mixed teams can effectively contribute to the elimination of this barrier over time. The second commonly mentioned barrier to effective cooperation were stereotypes. One add here that negative beliefs perpetuated in a company may have an impact on reducing the involvement of older people in the performance of professional tasks. They might have a demotivating and even destructive function for professional satisfaction and may also be the cause of increased sickness absenteeism or early resignation from the labor market. As also indicated in the previous paragraph – stereotypes are the basis for discriminatory behavior. For this reason, there is an urgent need for the management of the surveyed companies to identify the content of the reproduced beliefs, and to introduce tools that will make it possible to stop creating and transmitting stereotypes. In turn, the third most important barrier to cooperation is the conflict of values. Alicja Smolbik-Jęczmień notes that people born between the years 1945–1995 differ in their experience resulting from various economic, political and social situations, in which they found themselves over the years. This strictly affects their system of values, attitudes and behavior both in life and in the work environment (Smolbik-Jęczmień, 2019). Therefore, generational affiliation should be considered in human resources management processes. This barrier can be overcome for example by using the so-called culture of inclusion in the form of not only the creation of the already mentioned in the article mixed teams, but also by encouraging a proactive and open attitude at work, creating awareness among employees about the issue of diversity due to age, encouraging respect for the rights and diversity of others and developing cultural sensitivity (Przytuła, Krysińska-Kościńska, 2019; Oliveira, Cabral-Cardoso, 2017). The company can also take action aimed at integrating employees not only strictly inside a company. Therefore, the analyzed enterprises should make greater efforts to aid the possibility of building informal

² Used symbols: m_e – median; d – mode; $\bar{x}$ – arithmetic mean.

relations outside the workplace, e.g., by organizing integration meetings as well as sports activities.

In the area of interest of the author of the article, also two other barriers can be indicated, i.e., in the sixth position – lack of respect for older employees and in the ninth position – age discrimination (lack of a sense of fair treatment). It should be added here that although these elements have not been indicated as crucial, they may significantly affect the functioning of the surveyed enterprises in the future, as well as the seniors themselves. “Ageism in the workplace results in condoning violations of workers’ rights, in the employer tolerating worse treatment of older people in the workplace, in the reproduction and perpetuation of negative stereotypes about older workers. [...] The consequence of withdrawal from professional life is often the loss of authority in the family and society, and thus – a sense of loss of life goals, which in turn brings a negative balance of life satisfaction” (Sygit, 2008).

In order to verify hypothesis number 4, the interview questionnaire included a question whether the company has implemented an anti-discrimination policy. Only 18% of respondents gave a positive answer in this case. This allows for the last hypothesis to be rejected. Such a situation is not optimistic, as the progressing demographic processes will be responsible for numerous challenges that company managers will have to face. One of the important ones will be the mutual coexistence of older and younger generations. As stated by Ł. Jurek, “the aim is to achieve the synergy effect from the cooperation of employees of different ages. [...] The competences of young and old employees are complementary. Their cooperation generates added value, which increases the effect of the work of the entire team. In addition, such cooperation leads to the clash of different ideas, which results in an increase in creativity” (Jurek, 2012). Moreover, according to the gathered respondent’s answers, the employees themselves mostly do not expect that the company’s management intends to implement an anti-discrimination policy on the basis of age within the next 3 years in order to avoid the unfavorable impact of demographic trends on the intellectual capital of the company (only 5 indications). It is also worth adding that 46% of respondents rated their satisfaction with the workplace as “medium”, but their income level did not have an impact on it (13 people accepted its level and 10 were not satisfied with it).

Conclusions

The demographic transformation that can be observed today, and which consists in reversing the age pyramid, has its undoubted consequences on the labor market (Andrew,

2023). The rapid ageing of the population may lead even in the long run to a stagnation in the economy (Feng *et al.*, 2019). “The population is beginning to be dominated by old people, whose natural feature is risk aversion, and thus a low propensity to take on new challenges and economic initiatives” (Jurek, 2012).

For this reason, the changing proportion of economically active people to inactive people in favor of the second group is in the center of interest of theoreticians and should be also considered by the practitioners of management. There is an urgent need to maintain employment not only at the current level, but also to extend the professional activity of seniors. Unfortunately, these activities are not facilitated by stereotypes, which very often lead to the problem of age discrimination. Such actions, although prohibited by law, are not rarely undertaken and contribute to isolation, frustration or loneliness among seniors.

Research conducted in fifty small and medium-sized enterprises from the Poznań area confirms that discriminative practices are still being operating. Most of the respondents 50+ (54%) admitted that they had recently experienced age discrimination and the most common form of it was being disregarded. In their opinion (48%), company managers show too little interest about the respect for the rights and diversity of older people. Moreover, the fight against stereotypes and discrimination is not seen by managers as a priority in view of the growing demographic challenges. Their main focus is put on the introduction of flexible forms of employment and diversified working tools. However, in order to avoid increased sickness absence or early resignation from the workplace, it is necessary to increase awareness and interest of managers in age diversity issues, as well as aspects of equality and age discrimination. Unfortunately, in the surveyed companies, only 6 have so far implemented the age diversity management system, but – as indicated by respondents – in only 3 it works in the appropriate way (e.g. according to all of the applied procedures). What is more, 27 out of 50 respondents indicated that the approach to the multi-generational issue and potential difficulties arising from it is only intuitive, ad hoc on the part of the company’s management. There are no formalized procedures for matters like age discrimination or the fight against stereotypes. This is also confirmed by the data connected with the implemented anti-discrimination systems. In only 18% of companies such a system has been implemented so far.

Based on the respondents’ answers, it can also be pointed out that although age discrimination and stereotypes have not been recognized by them as the most important barrier to effective cooperation between the older and younger generations, they are in the group of ten most frequently indicated. Therefore, one cannot be surprised by the answers given by the vast majority of workers that their “well-being” in the workplace is on an “average” level.

The results of the research clearly justify the need for broad education on old age and aging aimed at people of all ages. Education about old age should start from an early age. Young people if they are familiarized with positive examples of old age and active and creative seniors can gain a positive image of this period of life. Preparation for old age includes educational activity in five areas, i.e. biological, mental, intellectual, social and economic. As J. Maćkiewicz (2010) rightly notes, “the implementation of these educational tasks should be carried out throughout the individual’s life, because only then are positive effects possible in the form of, among others, maintaining good health and fitness, a positive attitude towards old age, limiting the possibility of social isolation and decent living conditions and financial independence”. This is especially necessary when the social perception of old age has changed and the model of being young and youthful is nowadays widespread. The observed fear of old age associated with ignorance, reproduced false images of the older employee should be eliminated as soon as possible by both public educational authorities and health care institutions, as well as non-governmental organizations. In the face of unfavorable demographic forecasts, private entities should also choose this type of action focused on older workers as a priority. This will not only ensure the continuity of production processes by maintaining employment at the current level, but also gives a chance to extend the professional activity of aging staff. Thus, companies have a chance to maintain or even increase their competitive position on the market. Considering the issues of multigenerationality, diversity can contribute to a synergy effect through effective transfer of knowledge and experience between employees.

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