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Successful Aging at Work: A Comprehensive Literature Review

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Abstract

The aging workforce has become a significant concern for modern organizations as the proportion of older workers in the labour force continues to increase. This paper aims to critically examine the evolving concept of Successful Aging at Work (SAW), a crucial framework in the discourse on aging workforces. Understanding and implementing SAW has become increasingly significant for organizations worldwide due to the relatively fast demographic shift towards an increasing share of the older workforce. This literature review synthesizes key research findings, theoretical perspectives, and practical implementations of SAW, drawing on various academic sources. Central to the literature review is exploring the multidimensional nature of SAW, which involves the proactive maintenance and adaptive recovery of older workers' abilities and motivations. The review also considers various models and classifications of SAW, including the growth/recovery and maintenance framework. Additionally, it examines the intersection of personal development, age-related changes, and organizational strategies within the context of SAW. In conclusion, by integrating insights from diverse academic literature, this review aims to provide a comprehensive understanding of SAW, highlighting its importance in contemporary and future organizational settings. This literature review is a foundational resource for academics, practitioners, and policymakers interested in fostering successful aging at work.

Keywords: aging workforce, age management, successful aging at work, age-management, extending working life.

JEL classification: J11, J21 J24, J26, J28

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Introduction

The development of technology and higher medical level have significantly extended the average life expectancy of human beings, along with the aging of the baby boomer generation and the continuous decline of the birth rate, the aging of the population continues to intensify globally, and the group of older workers is becoming the main source of labor for a long time in the future. On the one hand, as individuals age, there is a certain degree of cognitive, motivational, and workability decline (Kooij et al., 2020), and older workers may face challenges and pressures such as increased risk of unemployment, fewer training opportunities, and outdated skills (Robson & Hansson, 2007). On the other hand, older employees have more work experience, have a clearer understanding of their own situation and career pursuit, and can integrate and utilize their own resources to positively shape the work environment, adapt to the work changes brought about by aging (Abraham & Hansson, 1995; Kooij, 2015), and create more value for the organization. How to enhance the work motivation of older employees, how to achieve the maintenance, recovery and growth of their work potential, as well as the improvement of performance and well-being, has gradually become an important direction in the field of organizational and managerial research (Kooij et al., 2020).

Successful Aging at Work

Against this backdrop, research on aging at work has been expanding over the past decade or so, with one prominent concept being "Successful aging at work". Successful aging at work focuses on how older employees cope with changes brought about by aging and remain successful at work in specific work situations (Abraham & Hansson, 1995; Kooij, 2015; Zacher, 2015). However, successful aging at work has remained a complex and broad concept since its introduction. In terms of age definition, compared to the focus on older adults and retirees aged 60 years and older in the field of gerontology, successful aging at work has not yet been defined uniformly by scholars in studies of successful aging in the work context, but generally focuses more on studying younger groups, 55 years old (Sanders & McCready, 2010), 50 years old (Thrasher et al., 2018). The ages of 45 (Cheung & Wu, 2014) and 40 (Robson & Hansson, 2007) are currently the more commonly used thresholds.

In terms of conceptual connotation, there are three perspectives on the definition of successful aging at work: (1) based on the comparative perspective, an employee achieves successful aging at work if the employee deviates from the average employee development trajectory in an increasingly positive manner in terms of both subjective and objective work outcomes throughout their career (Zacher, 2015); (2) based on the person-job matching perspective, defining successful aging at work as an individual's ability to maintain health, motivation, and work capacity in current and future jobs (Kooij, 2015); and (3) an integrative process- and outcome-based perspective, which considers successful aging at work to be the proactive maintenance of, or (post- decline) adaptive restoration of, high levels of competence and motivation to continue to work among older employees (Kooij et al., 2020). These different age definitions and conceptualizations on successful aging at work within the connotation are diverse and intertwined in terms of influencing factors and their theoretical explanations.

With the enrichment of research, scholars have successively reviewed the research on successful aging at work. Scientific reviews are mainly divided into three categories: one is to put forward the definition and basic research framework of successful aging at work by reviewing the development process of the concept of successful aging at

work and the theory of life course development related to it (Kooij, 2015; Kooij et al., 2020; Olson & Shultz, 2019; Zacher, 2015; Zacher & Rudolph, 2017), which focuses on providing direction for future research from a theoretical perspective. Discussions of the mechanisms of influence are based more on conceptual understanding and research assumptions.

The second category is to review existing research on successful aging at work, most typically by Zacher et al. (2018), by summarizing the content and research methods of six empirical articles on successful aging at work included in a special issue of *Work, Aging and Retirement*. However, their coverage of related research is limited.

The third category is to explore the influencing factors of successful aging at work based on a particular perspective, for example, through a conceptual review of the impact of technology on successful aging at work from the perspective of job design (Pak et al., 2023). Although Peng et al. (2022) provided the first holistic review of the concept and measurement of successful aging at work, theoretical foundations, and empirical studies, they needed to adequately explore the causes and mechanisms of successful aging at work. Therefore, it is necessary to address the shortcomings of the current review literature and reorganize the research progress on successful aging at work and its causal mechanisms to provide a reference for future research.

In this regard, instead of repeating the conceptual connotation, measurement, and theoretical foundation of life-course developmental psychology, which have been fully discussed, the research on successful aging at work will be summarized and reviewed from three aspects: the overall overview of the research on successful aging at work, the influencing factors, and the mechanisms of the occurrence of successful aging at work. First, a total of 74 scientific articles closely related to the topic of "successful aging at work" were screened and retained for content analysis. Second, 37 articles on the antecedents of successful aging at work were systematically analyzed, and the roles of four types of factors, namely, organizational and work environment, adaptive strategies, proactive strategies, and personal characteristics, as well as the application of theories were summarized. Finally, research recommendations are explored for the future.

Methodology

To ensure the quality and comprehensiveness of the selected literature, the PRISMA statement recommended by Moher et al. (2009) was used for literature search and screening, including the four steps of identification, screening, qualification, and retention.

First, the literature was identified in Web of Science, Scopus, EBSCO and Google Scholar databases: since the concept of successful aging at work began with Abraham and Hansson's (1995) study (Olson & Shultz, 2019), the period was limited to the period from 1995 to 2022, and the literature was identified as "successful aging at work," "successful aging in the workplace," and "successful aging in the workplace". Moreover, as the keywords to search, in order to prevent omissions, was also used "successful aging" with "older workers" "older employees" "workplace", "successful aging" and "older workers" "older employees" "workplace". Second, the preliminary literature was screened: Web of Science was used as the criteria to eliminate duplicates among databases, with a total of 223 articles. Third, to determine the qualified literature; the research on successful aging at work in the fields of gerontology, geriatrics, management, psychology, and organizational behaviour was included.

After reading the titles and abstracts, 81 articles were excluded from the search, and the remaining articles were read in full text. Additionally, 68 articles were excluded from the search, which contained the above search terms but did not consider the fields of successful aging and work; finally, after the above screening, 74 articles were retained which were closely related to the theme of successful aging in work.

Results

Basic Information on the Literature

To present a clearer picture of the development of successful aging research at work, this study adopted the content analysis method to organize the basic information of the literature. Information on the authors' countries, organizations, and research fields of the 51 articles was sorted out according to the timeline (see Table 1). The term "successful aging at work" has been used for nearly 30 years, and the related research has been developing rapidly in the past decade, especially scholars from the United States, the Netherlands and Germany are at the forefront of the research, and they have carried out extensive discussions on the topic of "successful aging at work". Successful aging at work is a topic that has been widely explored, and the information in the research area also reflects successful aging at work as the process expanding from traditional gerontology and geriatrics research to management, psychology and lately more in the field of organizational management psychology.

Table 1

Basic information of literature - authors country and field of study

Statistics on the number of authors and	Timing					
	2002 and before	2003-2007	2008-2013	2013-2017	2018 and after	total
By country						
United States	6	6	4	5	38	59
the Netherlands	0	0	12	21	16	49
German	0	0	7	15	24	46
Australia	0	0	0	7	2	9
United Kingdom	0	0	0	4	4	8
Austrian	0	0	0	3	4	7
Norway	0	0	0	0	6	6
Other	0	0	1	1	17	19
Field of research						
Psychology	2	2	8	15	28	55
Management studies	0	0	5	10	14	29
Industrial relations and labor	0	0	0	4	10	14
Gerontology	1	1	2	1	4	9
Trade	0	0	4	2	0	6
Geriatrics	1	0	1	1	2	5
Occupational health	0	0	2	0	1	3
Other	0	0	0	1	5	6

Source: Author's work (2024)

Antecedents of Successful Aging at Work

We focused on the 37 out of 74 papers that explicitly include "successful aging at work" as an outcome variable. Instead of introducing the specific content of theories related to successful aging, we extracted the theories that were applied at least twice. We organized the representative literature that applied these theories and had the highest citation rate to obtain the overall situation of the application of the theories (see Table 2).

Research on the antecedent mechanisms of successful aging at work is primarily based on theories related to the field of lifespan developmental psychology and the field of organizational behavior. Lifespan developmental theories focus on the specific mechanisms by which individuals strive to balance age-related gains and losses throughout the life course (Rudolph & Zacher, 2022), with Selective optimization compensation (SOC), Socioemotional selection theory (SEC), and Social and emotional selection theory (SES) as the main theories. The Selective optimization compensation (SOC), Socioemotional selectivity theory (SST), and Motivational theory on lifespan development (MTLD) are three specific lifespan developmental theories that have been developed to address age-related gains and losses throughout the life course (Rudolph & Zacher, 2022).

Three specific lifespan development theories are currently used to explain the coping patterns, behaviors, and mindsets of older adults during the aging process. In contrast, SOC theory is the most widely used theory in research on the antecedents of successful aging at work, followed by SST theory, which has been widely used to explore the effectiveness of selective, optimizing, and compensatory strategies in promoting successful aging outcomes for older employees at work, focusing on the behavioral aspects of aging.

SOC theory is widely used to explore the effectiveness of selection, optimization, and compensation strategies in promoting successful aging outcomes in the workplace for older workers, focusing on the selection process and realization of older workers' approaches from a behavioral strategy perspective.

SST theory, on the other hand, focuses on individuals' perceptions of and motivations for time (Carstensen et al., 2003), and has been applied primarily to explore individual factors that vary with age.

Like the SOC theory, the MTLD theory focuses on individuals' mental processes and behavioral choices in the workplace context from a behavioral strategy perspective, generalizing the ways in which individuals gain a sense of control into primary and secondary control (Heckhausen et al., 2010).

The most widely used organizational behavioral theories in the study of successful aging at work are the conservation of resources theory (COR) and the job demands-resources model (JD-R), both of which are related to the acquisition of resources by older employees in the workplace, and both of which are related to the acquisition of resources by older employees in the workplace. Moreover, both are related to older employees' access to resources at work. Still, the first is mainly used to explore the role of the organizational environment from the perspective of access to and conservation of resources. At the same time, the latter focuses on analyzing the impact of two job characteristics: job demands and job resources. Other theories, such as role theory, organizational support theory, and self-identity theory, have been applied to explore the effects of general organizational behavioral variables (e.g., job roles, organizational support, etc.) on the process of achieving successful aging at work.

Furthermore, it is worth noting that the above theories are not entirely independent

of each other. Therefore, current researchers also tend to combine two or more theories to explore antecedent mechanisms more comprehensively. Given that the life course developmental psychology perspective tends to focus more on individual psychological developmental processes and relatively neglects external influences brought about by the environment, with insufficient attention paid to human-environment interactions (Zacher & Rudolph, 2017), it is, therefore, important to combine life course developmental theories with organizational behavioural theories in a multidisciplinary framework.

Table 2

Antecedents of Successful Aging at Work

Theoretical perspective and main content	Researcher	Independent variable	SAW operationalization
SOC (Baltes & Baltes, 1990; Baltes, 1997): To offset age-related losses, individuals can adapt through selection, optimization, and competition strategies to rebalance the gain—loss ratio.	Abraham & Hanson, 1995	SOC strategy	SAW Performance/ Capability Realization
	Zacher & Frese, 2011	Age, job complexity	SAW's focus on opportunities
	Kooji et al., 2015	Adaptive job crafting	SAW maintains work motivation and ability
	Ng & Law, 2014	SOC strategy	SAW responds to change in the workplace
	Mueller et al., 2012	Job control	Ability to work
SST (Carstensen et al., 2003): As age increases, an individual's future time perspective changes from open to limited. Individuals with an open future-time perspective will pursue instrumental and intellectual goals. In contrast, a limited future-time perspective guides people to invest more resources into emotionally positive and meaningful goals.	Zacher & Yang 2016	Age	SAW job satisfaction
	Le Blanc et al., 2017	Calander age, organizational age, functional age	SAW sustainable employability
	Toomey & Rudolph, 2018	Emotionally arousing events	Empathy SAW
	Thrasher et al., 2018	Conceptualizing age (subjective age, functional age, future time perspective)	SAW development motivation, promotion, motivation, safety certificate
MTLD (Heckhausen et al., 2010): Successful aging can be achieved by optimizing primary control strategies (trying to influence the environment) and	Akkermans et al., 2016	Actual age, subjective age	SAW internal work experience, external work certificate, motivation to continue studying and working
	Wong & Tetrick, 2017	Task reshaping, relationship	

secondary strategies (trying to adapt oneself to the environment).			SAW adapts to work changes, maintains people-job matching
COR (Hibfoll et al., 2018): People have a tendency and motivation to preserve and protect their existing resources and acquire new resources. When resources face losses and threats, individuals will maintain current resource reserves and acquire new resources through the management of existing resources.	Cheung & Wu, 2012	Work stressors, coping resources, supportive HRM and social support	SAW adaptability and health, positive relationships, career growth
	Pak et al., 2021	HRM	SAW (perceived workability, strength, preferred retirement age)
JD-R model (Demerouti et al., 2001): Work resources will trigger the motivational process, improve the individual's psychological state, and promote the realization of work goals; work requirements are related to individual mental and physical consumption, causing burnout, work stress, etc.	De Lange et al., 2020	Calander age, job demands, job resources, supervisor support and co-worker support	SAW sustainable employment capabilities
	Pak et al., 2020	Job demand, job resources	SAW (ability to work)
SOC, SST	Taneva & Arnold, 2018	SOC Strategy, HRM, Work	SAW Work Performance
SOC, COR	Weigl et al., 2013	SOC policy, age, work control	SAW (ability to work)

Source: Author's work (2024)

Influences in Successful Aging at Work

Successful aging at work is a convergence of two research fields: organizational behaviour and life-course developmental psychology. Its realization is influenced by a combination of organizational and workplace environmental factors, age-change-related personal characteristic factors, and coping strategies (Kooij et al., 2020; Pak et al., 2023; Zacher, 2015).

Individual coping with aging, however, as a self-regulatory process, involves efforts to adapt and proactively modify to conditions that change with age. Accordingly, this study reviews 37 research papers on the antecedents of successful aging at work, describes how four categories of factors, namely, organizational and work environments, adaptive strategies, proactive strategies, and personal characteristics, influence successful aging at work and focuses on and introduces

the theoretical applications of the research.

Table 3

Classification of Influencing Factors on Successful Aging at Work

Influence	Description
Organizational and Work Environment Factors	Organizational and work environment factors play an important role in the successful aging at work process for older employees (Kooij et al., 2020; Pak et al., 2023). Based on the theories related to "resources" in organizational behaviour, research has explored the structural factors, i.e., opportunities and constraints in the organization and work environment, that promote or hinder successful aging at work.
Adaptive Strategies	Successful aging requires older workers to adopt adaptive strategies for the potential loss of physical, psychological, and career opportunities at work (Abraham & Hansson, 1995), which focuses on adjusting their goals and actions to cope with the age-related losses and work-related stresses they are currently experiencing, and to reduce the mismatch between the individual and the environment in order to maintain healthy development and positive work outcomes (Abraham & Hansson, 1995).
Proactive Strategy	Older employees are not only passive recipients of environmental change but also shapers of their own environments (Kooij, 2015; Wang Zhongjun et al., 2019). Proactive strategies in the process of successful aging at work emphasize self-initiated positive actions by individuals based on their own developmental needs to achieve future person-environment matches or reduce person-environment mismatches brought about by age change.
Personal Characteristics Factors	The influence of personal characteristic factors on older employees' achievement of successful aging at work is mainly in the areas of age, cognition, motivation and emotion.

Source: Author's work (2024)

Discussion

An academic examination of successful aging at work begins with a visual content analysis that provides an overarching view and discerns research trends, tracing both the evolution and the theoretical underpinnings of prior studies. This encompasses an assessment of how earlier research developments have contributed to the current understanding. In parallel, the influence of four distinct factor categories on older workers' successful aging at work is synthesized and scrutinized, delineating the theoretical implementation drawn from antecedent research. These categories include the organizational and work environment, adaptive strategies, proactive strategies, and individual characteristics.

Elaborating specifically on organizational and work environment influences, current literature frequently addresses job characteristics through the lens of the job demands-resources model, while the effects of organizational factors such as leadership, organizational support, and human resource practices are examined through other theoretical frameworks like organizational support theory and conservation of resources theory. When it comes to adaptive strategies, the exploration centres on how selection, optimization, and compensation (SOC) strategies, as per SOC theory, along with other behaviors aimed at work adjustment, influence successful aging. This entails both qualitative and empirical research: the former delves into the specific aspects of SOC strategies employed by older workers,

and the latter assesses the predictive power of these strategies on successful aging outcomes.

Proactive strategies in current research are closely examined for their role in facilitating successful aging among older workers. These include various forms of job crafting and career development tactics that are tailored to the aging work population, contrasting with general job crafting behaviors. Research in this area integrates lifespan developmental theories, highlighting adaptive functions represented in frameworks such as SOC theory and MTLT theory, to understand the unique job crafting behaviors of the aging workforce. In relation to personal characteristics, investigations predominantly focus on age-related aspects such as cognition, motivation, and emotional factors, with socioemotional selectivity theory (SST) and emotion regulation theory frequently serving as the conceptual bases for such studies.

Conclusion

In the context of a rapidly aging global workforce, the concept of successful aging at work has garnered considerable scholarly attention due to its pivotal role in promoting productivity improvement, career development, and the realization of work values among older workers. Following the PRISMA statement, 74 papers screened from databases were reviewed, focusing on four key aspects: content analysis, classification of influencing factors, comprehensive review of antecedent mechanisms, and outlining future research prospects.

Future research could be approached from the following perspectives. An initial focus could be on examining how "structural" factors affect the developmental trajectory of an individual's life. This examination would benefit from an interdisciplinary perspective, seeking to improve the explanatory power of current theories by integrating insights from the realms of developmental psychology across the lifespan and business management. In addition, it is critical to continue and intensify the examination of the factors preceding successful aging in the workplace. This should involve a more detailed exploration of the influences and mechanisms associated with work and organizational factors, a systematic evaluation of the different proactive and adaptive coping strategies for promoting successful aging, and an investigation into the synthesis of these strategies in theoretical and applied contexts; and a deeper investigation into the interplay between subjective perceptions of age and time-related personal traits and how these collectively affect the adoption, implementation, and results of coping strategies when addressing the challenges posed by aging at work. Achieving this will lead to a richer and more profound comprehension of the theory and practice underlying successful aging at work.

Finally, future studies are prompted to enhance the precision of research sampling and methodological approaches. This involves paying greater attention to the segment of employees who are during their careers, stressing the use of qualitative and longitudinal quantitative research methods, as well as the application of experimental and interventional study designs. Moreover, it is suggested to better measure the changes in work and personal behaviors related to aging by integrating methods such as unbiased observations, peer assessments, and archival research, in addition to self-reports.

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