

Mental Stimulation and Lifelong Learning Activities in the 55+ Population

**Elderhostel, Inc.
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Activities Mentioned in Focus Groups		
<ul style="list-style-type: none"> • Cooking • Horse Racing • Languages • RVs • Skating • Dancing • Magic • Flying • Collecting 	<ul style="list-style-type: none"> • Gardening • Movies • Teaching • Quilting • Sailing / Boating • Chess • Jewelry-Making • Choir 	<ul style="list-style-type: none"> • Puzzles • Shopping • Oils / Watercolors • Sewing / Knitting • Hunting • Coaching • Theater • Acting

Figure 1

The Five Lifelong Learning Segments

We analyzed the multivariate data from our quantitative survey to create segments based on mental stimulation or lifelong-learning activities, various psychological measures, and demographics. The segmentation analysis yielded five distinct segments, ranging in size from 11.0% to 34.0% of the 55+ population. We then studied the segments carefully to create descriptive names for these segments (see Figure 2).

The first two segments, including *Focused Mental Achievers* and *Contented Recreational Learners*, together represent a group of older Americans who are very active, committed and self-sufficient when it comes to mental stimulation and lifelong learning.

The next two segments, including *Anxious Searchers* and *Isolated Homebodies*, make up a group that is engaged only modestly in mental stimulation and lifelong learning. Individuals in these segments we believe would benefit from more active engagement.

The last segment — *Pessimists* — includes individuals who are relatively poor, pessimists. While we believe everyone can benefit from a life of rich mental

engagement, people in this group are more focused on basic issues of survival and are likely to be difficult to engage in lifelong learning.

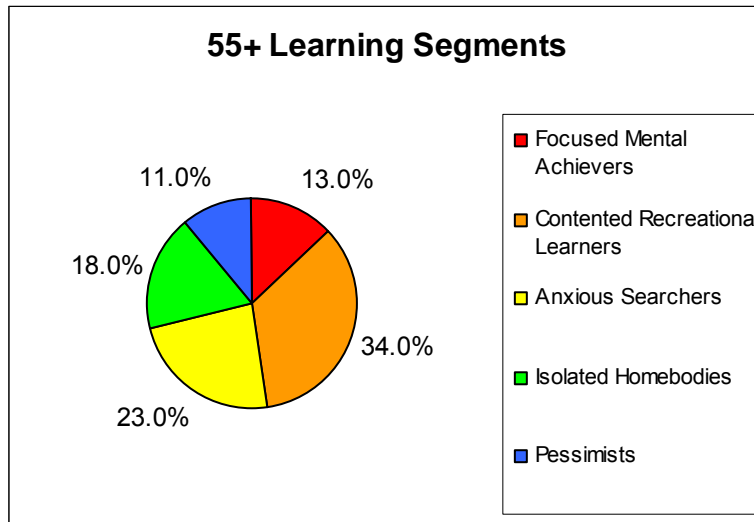


Figure 2

Focused Mental Achievers

Focused Mental Achievers (13.0% of the surveyed 55+ U.S. population) are thirsty for learning of almost every imaginable kind, outpacing all other segments in participation in almost every activity. They're especially drawn to challenging academic pursuits; on a once-a-month-or-more basis 14.1% study a foreign language (more than four times the rate of any other segment), and 65.7% read nonfiction books. At a rate more than double any other segment they participate in the following activities on a once-a-month-or-more basis: reading classical or literary novels (43.5%), astronomy (13.8%), listening to books on tape (17.3%), and genealogy (18.0%). Several activities especially popular with *Focused Mental Achievers* are both intellectually stimulating and socially rewarding; 29.4% attend a class in person once a month a more, and 10.8% participate in a book club once a month or more. *Focused Mental Achievers* on average participate in 17.6 of the surveyed activities weekly. The average age of *Focused Mental Achievers* is 65.1 years.

Focused Mental Achievers are also oriented toward their communities, giving while also receiving a social benefit in return: 31.6% volunteer for a community-sponsored activity, 26.2% serve as nonpaid members of the board of a charitable or volunteer organization (more than twice the rate of any other segment), and 20.0% volunteer time to teach, either as a coach, a mentor, a literacy instructor or in some other capacity.

They're also disproportionately drawn to both experiencing culture and creating their own cultural experiences; on a once-a-week-or-more basis 66.5% watch PBS television programs, 14.4% play a musical instrument, 46.3% write, and once a month or more 41.1% visit museums, libraries or art exhibits.

Focused Mental Achievers are physically active: on a once-a-month-or-more basis, 20.8% dance, 22.4% participate in group aerobic exercise, 35.0% lift weights, 20.8% run. Some of their activities blend physical activity with social, intellectual or creative activities. Seven percent (more than three times any other group) participate once a month or more in acting, drama or community-based theater.

Focused Mental Achievers are interested in seeing and experiencing the broader world, as well as seeking mental stimulation and lifelong learning closer to home. More than half (53.8%) hold a valid passport, and 69.3% have traveled overnight in the past five years to attend a class, seminar or learning event. They are undaunted (only 9.0% strongly agreed with the statement "I don't like to fly right now") and ready to go (45.4% strongly agreed that "If I wanted to, I could easily find time to schedule a two-week trip somewhere").

Focused Mental Achievers are optimistic (with a 117 optimism index against the national sample) and satisfied with life (115 index). Meanwhile, 66.5% strongly self identify as "true life-long learners." Two thirds (66.8%) know someone who is suffering from dementia or Alzheimer's; 92.1% agree or strongly agree with the statement: "If you

don't continue to use your mind as you age, you will be more likely to suffer from memory loss, dementia, or Alzheimer's [disease]."

Not surprisingly, *Focused Mental Achievers* are highly educated and relatively healthy: 52.9% graduated from college or more; 59.4% self reported "very good" or "excellent" health, and 54.0% exercise three or more times per week.

Contented Recreational Learners

Contented Recreational Learners (34.0% of 55+ U.S. population) are as optimistic (117 index) and satisfied (112 index) as *Focused Mental Achievers*, but only 43.1% strongly characterize themselves as "true life-long learners." Their interest in academic pursuits is distinct but moderate: on a once-a-month-or-more basis, 1.7% of *Contented Recreational Learners* study a foreign language, 37.4% read nonfiction books, and 5.5% listen to lectures, seminars or classes on tape. Interest in activities that are both intellectual and social is also modest: 14.9% attend a class in person once a month or more; 3.2% attend a book club once a month or more, and 27.7% play cards with friends once a month or more. *Contented Recreational Learners* participate in an average of 13.2 surveyed activities weekly. Their average age is 68.2.

Contented Recreational Learners are more moderately interested in giving back to their communities; 19.4% volunteer monthly for a community-sponsored activity.

They're very interested in cultural or artistic experiences and personal creative expression, though less so than *Focused Mental Achievers*: on a once-a-week-or-more basis 52.3% watch PBS television programs; 5.6% play a musical instrument; 18.6% write, and once a month or more 13.7% visit museums, libraries or art museums.

Contented Recreational Learners are physically active: 61.1% walk for exercise; 10.2% cycle, and (in season) 48.9% garden once a week or more.

Also, 40.8% of *Contented Recreational Learners* hold a valid passport, only 10.7% “don’t like to fly right now,” and 30.8% could find time to schedule a two-week trip somewhere.

Contented Recreational Learners are less well-educated than *Focused Mental Achievers*; 29.0% have college degrees or higher. While fewer *Contented Recreational Learners* (41.6%) than *Focused Mental Achievers* (52.1%) report household incomes of \$50,000 or more, *Contented Recreational Learners* are more relaxed about their financial situation: fewer *Contented Recreational Learners* (32.0%) than *Focused Mental Achievers* (36.6%) report concern about their financial future.

Overall, *Contented Recreational Learners* are optimistic, satisfied, and laid-back. They’re active intellectually, physically and socially, but perhaps less intense about it all than their *Focused Mental Achiever* counterparts. *Contented Recreational Learners*, for example, had a mean score of 3.14 (out of 5) on the question “It’s easy for me to relax;” *Focused Mental Achievers* had a mean score of 2.96.

Anxious Searchers

Anxious Searchers (23.0% of the surveyed 55+ U.S. population) participate in activities at roughly the same rate as *Contented Recreational Learners*, yet they’re more agitated and less optimistic and satisfied than their *Contented Recreational Learner* counterparts, with below-average levels of optimism (86 index) and life satisfaction (85 index). *Anxious Searchers* are involved in an average of 12.1 surveyed activities weekly. The average age of *Anxious Searchers* is 66.4.

Like *Contented Recreational Learners*, their interest in academic pursuits is distinct but moderate: on a once-a-month-or-more basis 3.3% of *Anxious Searchers* study a foreign language, 41.1% read nonfiction books, and 10.5% listen to lectures, seminars

or classes on tape. In addition, 13.9% attend a class in person once a month or more and 5.4% attend a book club once a month or more.

Anxious Searchers are relatively withdrawn from their communities; only 11.9% volunteer once a month or more for a community-sponsored activity.

They're also less interested than individuals in the first two segments in cultural or artistic experiences or in personal creative expression; on a once-a-week-or-more basis 49.1% watch PBS television programs; 4.4% play a musical instrument; 22.3% write, and once a month or more 14.5% visit museums, libraries, or art museums.

Anxious Searchers are nearly as active physically as *Contented Recreational Learners*: 52.6% walk for exercise, 4.0% cycle, and (in season) 49.2% garden once a week or more.

Anxious Searcher involvement in travel is low. Only 27.7% have valid passports and 21.3% strongly agree that they "don't like to fly right now."

Anxious Searchers are somewhat less well-educated than *Contented Recreational Learners*; 22.8% graduated from college or more.

Anxious Searchers have real concerns about their well-being; 43.9% report that their health "isn't very good right now," and 58.9% have real concerns about their financial future. Also, 19.3% reported significant stress, strain or pressure during the past few months, no doubt attributable to health and financial issues.

Overall *Anxious Searchers* are moderately engaged in lifelong learning but — possibly because of physical or financial restraints — have less social engagement than either *Focused Mental Achievers* or *Contented Recreational Learners*. Only 26.9% self report as "true lifelong learners."

Isolated Homebodies

Isolated Homebodies (18.0% of the surveyed 55+ U.S. population) have average levels of optimism (94 index) and life satisfaction (97 index). They have low levels of interest in academic-oriented pursuits; on a once-a-week-or-more basis only 2.5% attend a class in person and only 4.3% read nonfiction books. *Isolated Homebodies* are involved in an average of 7.4 surveyed activities weekly. Their average age is 67.2.

Isolated Homebodies are distinguished from the three segments described above by comparatively low levels of participation in activities that take you out of the house and into contact with other people. Only 5.4%, for example, sing in a chorus or other group; the next lowest group, *Anxious Searchers*, participate at a 16.5% rate. Similarly, only 5.1% attend a class in person (compared to 13.9% of *Anxious Searchers*), 4.7% dance (compared to 10.1% of *Anxious Searchers*), and no respondents classified as *Isolated Homebodies* attended a book club.

Isolated Homebodies have distinctly lower levels of participation in physical activities; on a once a week or more basis 34.3% walk for exercise, 5.1% cycle, and 33.2% garden (in season).

Only 14.1% of *Isolated Homebodies* hold valid passports, and only 3.7% went on a group tour to an international destination other than Canada in the last 5 years.

Isolated Homebodies have low levels of formal education (only 6.5% graduated from college or more), yet nearly as many *Isolated Homebodies* (23.8%) as *Anxious Searchers* (26.9%) self report as “true lifelong” learners.

Isolated Homebodies’ preferred style of learning (74.7%) is “experiencing something hands-on.”

Isolated Homebodies are laid-back, with only 7.8% reporting significant stress or strain in the past several months, and in reasonably good health, with only 27.4% reporting that their health “isn’t very good right now.”

Pessimists

The *Pessimists* (11.0% of the surveyed 55+ U.S. population) have pressing concerns that could prohibit them from seeking out lifelong learning activities. The *Pessimists* are involved in a scant 4.5 surveyed activities weekly. None are learning a foreign language or participate in a book club; 4.4% volunteer once a month or more for a community activity; 7.9% garden (in season). Their optimism (68 index) and life satisfaction (80 index) scores are the lowest of any segment; 64.5% report that their health “isn’t very good right now,” and 55.5% report strong concern about their financial future. Only 6.3% of the *Pessimists* graduated from college or more. The activities they participate in at rates well above the national average include casino gambling and watching movies on TV. The average age of the *Pessimists* is 69.6 years.

The Elderhostel Segments

Once the segments were established using data from the national sample survey, respondents to the Elderhostel participant survey were assigned to the same segments, and 85% of the Elderhostel respondents fell into the *Focused Mental Achiever* and the *Contented Recreational Learner* segments. (See Figure 3.) An additional 11% of the Elderhostel respondents fell into the *Anxious Searcher* segment, a segment which, despite exhibiting relatively low levels of optimism and life control, is characterized by a relatively high interest and involvement in lifelong learning activities (average weekly involvement in 12.1 activities); 4.5% fell into the *Isolated Homebody* segment, and 0.5% fell into the *Pessimists* segment.

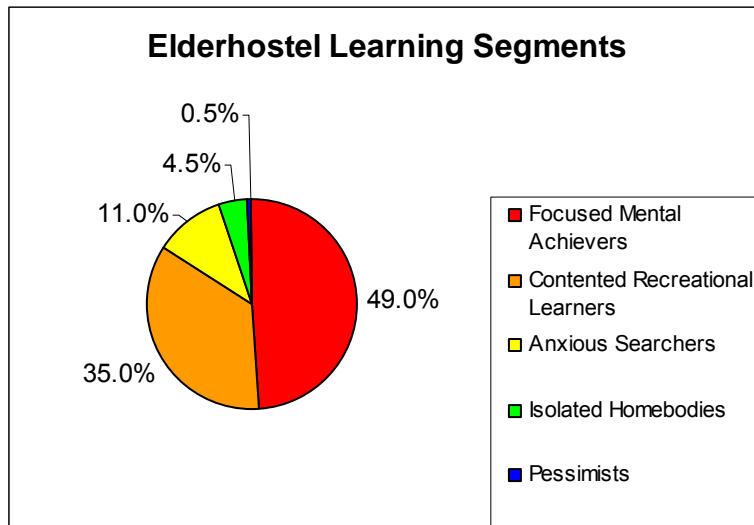


Figure 3

Elderhostel Participant Activities

Once we saw the considerable overlap between the Elderhostel participant respondents and the *Focused Mental Achiever* and the *Contented Recreational Learner* segments, we decided to go back into the field to conduct additional informal, qualitative research with the objective of discovering what other activities Elderhostel participants were involved in that were not included in the original survey. To accomplish this objective, we sent an e-mail to a group of our most active participants asking them to submit a free-form and open-ended essay describing activities they do that keep their “minds active and their brains sharp,” and to provide additional illuminating details about those activities.

We received approximately 335 thoughtful responses, and the activities mentioned were carefully coded and categorized. As we studied and pondered the list of activities and considered the many comments the Elderhostel participants had written, we began to see some interesting patterns emerge that have helped us create a richer picture of the lifelong-learning lifestyle.

A few dozen activities recurred frequently in the essays the Elderhostel participant submitted (see Figure 4). Each activity on the list is mentally stimulating. What stands out, however, is that nearly all activities have not only the dimension of mental stimulation, but a second, third, and in some instances fourth, dimension of social engagement, physical activity, or creative endeavor. In other words, lifelong learning — as defined by this highly active group of practitioners — is far more than attending college classes or tackling more sophisticated literature or nonfiction. And “mental stimulation” is far more than solving crossword puzzles or performing the solitary brain exercises some experts recommend. Rather, those older people with a commitment to “lifelong learning” are involved in a complex web of social, physical, and creative activities, each with a common core of mental stimulation.

Consider dancing, which, among the Elderhostel participants who wrote to us, refers primarily to ballroom dancing but also to more specialized forms such as Morris dancing. This kind of dancing is a complex activity, requiring great mental application to master. It’s terrific exercise. It’s social. And — certainly at advanced levels — dancing is a creative endeavor. In the lifelong-learning “lifestyle,” dancing has superstar status.

Even the two activities on the following list that were conservatively scored as only having a dimension of mental stimulation — “earn an advance degree” and “study a foreign language” — often have other dimensions. Earning an advance degree may involve group work (social engagement) and likely gets participants out of the house for some low-level physical activity; studying a foreign language also may take place in a classroom setting away from the home.

Frequently Mentioned Mental Stimulation Activities (Elderhostel Participants)

	Mental Stimulation	Social Engagement	Physical Activity	Creative Expression
Create website/blog	√			√
Play bridge	√	√		
Earn an advanced degree	√			

Study a foreign language	√			
Pursue genealogy	√	√		
Write	√			√
Teach literacy or ESL	√	√		
Community theater or play-reading	√	√	√	
Book club	√	√		
Lifelong Learning Institute	√	√		
"Scheduled socializing"	√	√		
Volunteer as a docent	√	√		
Dancing	√	√	√	√
Gardening	√		√	√
Tennis	√	√	√	
Digital photography	√			√
Play a musical instrument	√	√		√
Sing in a chorus	√	√	√	√

Figure 4

One activity on the list deserves a clarifying comment. “Scheduled socializing” is a term of our own invention. A number of respondents described getting together with the same group of friends for a meal at the same place every week for an open-ended, give-and-take review of their own lives and the world about them. They consider “scheduled socializing” to be mentally stimulating because they learn from each other, keep sharp as they can give and dodge repartee, and because these relationships are among the most important and stimulating in their lives.

Further Questions

This report *describes* five population segments using dimensions that include lifelong learning and mentally stimulating activities, psychological measures, and demographics, and we believe establishes a *correlation* between high levels of mentally stimulating activity, optimism, life satisfaction, educational attainment, self-reported good health, and higher economic status. Correlation, of course, is not causation, and our findings raise a number of intriguing additional questions, including: