



# Reinventing Aging

BABY BOOMERS AND CIVIC ENGAGEMENT

Harvard School of Public Health–MetLife Foundation  
Initiative on Retirement and Civic Engagement



Center for Health Communication  
Harvard School of Public Health

**MetLife Foundation**

# Foreword

This Report is a product of the Harvard School of Public Health–MetLife Foundation Initiative on Retirement and Civic Engagement, a program of the Center for Health Communication at the Harvard School of Public Health. The Report spotlights key issues that must be addressed to involve large numbers of baby boomers in volunteer activities as they reach retirement. There is a tremendous opportunity on the horizon to tap the time, energy, skills, and experience of millions of boomers to strengthen community life. However, considerable work lies ahead if this opportunity is to be realized. This Report recommends actions by key sectors of society, including government, nonprofit organizations, business, philanthropy, faith-based institutions, and the media. It is hoped that the Report will provide focus, lend visibility, and add momentum to activities already underway, and stimulate the growth of new initiatives.

## **About the Center for Health Communication:**

The Center for Health Communication of the Harvard School of Public Health has created a series of national media campaigns to promote the adoption of healthy behaviors. The Center's National Designated Driver Campaign demonstrated how a new social concept—the designated driver—could be rapidly introduced through mass communication, promoting widespread adoption of a social norm that the driver does not drink. The Center's Harvard Mentoring Project, a national media campaign conducted in collaboration with leading media companies and nonprofit organizations, recruits volunteer mentors for at-risk youth. The Center is developing a new campaign to change public attitudes toward aging and recruit boomers as community volunteers. More information about the Center is available at [www.hsph.harvard.edu/chc](http://www.hsph.harvard.edu/chc).

## **About MetLife Foundation:**

MetLife Foundation was established in 1976 by MetLife to carry on its longstanding tradition of corporate contributions and community involvement. Grants support health, education, and civic and cultural programs throughout the United States. In the area of aging, the Foundation funds programs that promote mental fitness, encourage civic involvement, and create public awareness of health issues such as Alzheimer's disease. More information about the Foundation is available at [www.metlife.org](http://www.metlife.org).

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# Acknowledgments

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We also thank the Conference participants for sharing their insights and providing assistance in preparing this Report. The opinions expressed in this Report are those of the Conference Planning Committee and do not necessarily reflect the opinions of Harvard University, MetLife Foundation, or Conference participants. The opinions expressed in the Background Papers are those of their respective authors.

# Report Highlights

**Approximately 77 million babies were born in the United States during the boom years of 1946 to 1964. In 2011, the oldest will turn 65, and, on average, can expect to live to 83. Many will continue well into their 90s.**

The baby boomers soon will have the opportunity to redefine the meaning and purpose of the older years. As some of the demands of work and family that have commanded their attention in mid-life recede, boomers will have the potential to become a social resource of unprecedented proportions by actively participating in the life of their communities.

But will they participate? Compared to their parents' generation, the so-called "Greatest Generation," boomers have done less by every measure of civic engagement, including rates of voting and joining community groups. Given this reality, *Reinventing Aging: Baby Boomers and Civic Engagement*, a report from the Harvard School of Public Health–MetLife Foundation Initiative on Retirement and Civic Engagement, examines these questions:

- Can a national effort succeed in mobilizing large numbers of boomers to contribute their time, skills, and experience to address community problems?
- If boomers respond in large numbers, will civic organizations of various kinds be prepared to receive them?
- What roles can the news media, the advertising industry, and Hollywood play in helping society redefine the meaning and purpose of the older years?

The following are key observations from the Report:

## **The link between age and retirement is eroding.**

The closing decades of the 20th century brought a reversal in what had been a long-term trend toward earlier retirement. Since the mid-1980s, workforce participation has increased slightly for

older American men, and dramatically for older women, and the average age of retirement has risen. This reversal may be due, in part, to the strong economy of the late 1980s and 1990s. It may also reflect underlying structural changes that will likely have longer-lasting effects, including the end of mandatory retirement, the decline in defined benefit retirement plans, changes to Social Security that eliminate disincentives to remain in the labor force, changes in the occupational mix, technological advancements, and improvements in the health and longevity of older Americans.

Instead of retiring en masse in their late 50s or early 60s, boomers are more likely to continue working longer, and to move gradually towards complete retirement. The year 2011, when the first boomers reach 65, may be less of a watershed than anticipated if the connection between age and retirement continues to erode.

### **Contrary to conventional wisdom, more people volunteer in mid-life than in retirement.**

Conventional wisdom holds that individuals volunteer in greater numbers and with greater frequency after they retire, when they have time on their hands. This is only partially correct. As a general rule, the percentage of people who volunteer reaches a peak in mid-life—not in retirement—and then gradually declines. Volunteering in this peak period is associated with having more, rather than fewer, obligations and commitments. On the other hand, individuals who do volunteer during their early years of retirement do so with greater frequency than mid-life volunteers. Indeed, boomers' parents show an additional peak of volunteer activity in their 70s, although this late peak was not observed in the preceding generation and may reflect the Greatest Generation's exceptional civic behavior.

### **Large-scale efforts may be needed to recruit boomers as volunteers.**

Given that boomers have been far less civically engaged than the Greatest Generation at every stage to date, it is not clear to what extent they will fill their parents' shoes through volunteer activity in their retirement years. Although close to one-third of boomers say they expect to participate in community service after retirement, there is a difference between intentions and actions, and boomers may need a push.

A national campaign—on a scale not previously attempted—might very well succeed in mobilizing boomers to act on their stated intentions. Such a campaign, comparable to the National Designated Driver Campaign of the late 1980s, could have a big impact by stimulating a public dialogue about the meaning and purpose of the later years, working with the entertainment and advertising industries to rethink images of aging, and encouraging journalists to cover aging in new ways.

### **Productive aging will require careful planning by individual boomers.**

When psychologist Erik Erikson delineated his concept of the life cycle, he saw the final stage, commencing in one's 60s, as a retrospective undertaking toward the end of life. Erikson later revisited his earlier work to take into account the new demographics, and warned against "an initial retirement holiday followed by a dangling and unproductive aging of many years' duration." Erikson and colleagues urged those in their 50s to develop plans to meet the challenge "squarely," advocating "'clear insight' into how the elders in our present society can become more integral coworkers in community life." An organized effort could help boomers envision, and plan for, a life that achieves meaning in their later years by connecting in new ways to the larger community around them.

### **The current language of aging is obsolete and may be an impediment to change.**

Words like "work," "retirement," "volunteer," and all of the language related to aging (e.g., "seniors") oversimplify a complex reality, and may serve as barriers to change. To combat the negative image of the frail, dependent elder that underpins a grim view of the future, society may have too willingly embraced the contrasting image of the "active senior"—indefatigable, healthy, usually wealthy, and eternally young. Both images have limitations. New language, imagery, and stories are needed to help boomers and the general public re-envision the role and value of elders and the meaning and purpose of one's later years. The entertainment industry, given its role in storytelling across the social spectrum, may be the most promising vehicle for conveying alternative images of aging and portraying individuals of all ages participating in community life. In addition, the advertising industry can play a key role by offering alternatives to the narrow set of existing images that reflect current social attitudes toward aging.

### **Organizations may need retooling to attract and retain boomer volunteers.**

Existing voluntary or charitable institutions may need to be revamped to absorb boomer volunteers and take account of their interests and preferences. Many local agencies will not have the resources for professional volunteer management, so new mediating institutions, or third parties, may be needed to handle recruitment, training, and referral of boomers.

National nonprofit organizations in public health, social services, youth development, aging, and education should take the lead in helping local affiliates identify and develop volunteer opportunities to obtain services they otherwise would not be able to afford. Planning should take into account that individuals from a broad range of backgrounds and experiences can fill a variety of useful roles.

### **A wide range of volunteer opportunities will be needed.**

Organizations that utilize volunteers should offer a broad set of options that allow people to engage in different ways at different times and at different levels of commitment. These options

should range from one-time or episodic opportunities that enable boomers to test the waters and shop around to sustained and intensive commitments.

### **Intergenerational programs deserve special attention.**

Community-based initiatives that bridge the generations should receive special attention. These programs build community by integrating the old with the young, transmitting knowledge and experience to future generations and re-enforcing the value of people of all ages. Studies have found that young people in such programs show measurable improvements in school attendance, attitudes toward school and the future, and attitudes toward elders. Adult volunteers report substantial benefits to themselves: the satisfaction of sharing their experience, feeling useful, and giving back to the community.

### **Communities should develop plans to involve boomer volunteers in tackling important local problems.**

Towns and cities should consider organizing large-scale, volunteer-based efforts that reach out to various sectors of their community in an inclusive way to identify and respond to the community's most pressing problems. The success of such efforts—involving individuals of all ages—is likely to depend on a leadership cadre of volunteers who are prepared to make it their principal activity. Once initiatives are designed with broad input, leaders can offer other volunteers a continuum of opportunities for involvement, ranging from episodic to regular and from casual to intensive.

### **Informal volunteering and “helping” should be valued and encouraged.**

Some boomers may prefer opportunities for civic engagement that do not involve working through an agency. These individuals include self-starters who, when they see a need, do something about it, perhaps organizing friends and neighbors to work with them. Social engagement also includes the kind of informal neighbor-to-neighbor helping that is common in many communities. Informal initiatives should be encouraged as valued alternatives to agency-based volunteer service.

**The main message of this Report is that there is an opportunity to help boomers create a social legacy of profound importance. Their added years of life give them the chance. Their experiences in life give them the capability. And the need to come to terms with the world in a way that brings integrity to their life gives them the psychological incentive. Much may depend on the actions of the first wave of boomers, many of whom, while inspired in their formative years by President Kennedy's call-to-service, have been notably less involved in civic life than their parents. This first wave may serve as role models for younger boomers, and for future generations as well. All of society will have a stake in the outcome.**



## 1

# Introduction: Coming of Age

The year was 1968. Young people who were eligible to vote in their first presidential election that year were the front ranks of 77 million children and adolescents who made up the post–World War II “baby boom.” Their sheer numbers had already made them a force to reckon with as they moved through the earliest phases of their collective life. They had overwhelmed the resources of local school districts once they hit school age. They had created their own distinctive youth markets for music, clothes, and other consumer goods as soon as they could spend their parents’ money. And they had aggressively acted out against their elders’ social norms around sex, race, gender, and civil authority as they struggled through adolescence. They had announced to the world that they trusted no one over 30.

That was then.

Now, in 2004, those baby boom front-runners are turning 58 years old, and even the youngest boomers are entering their more sedate 40s. As they have moved through life, boomers have continued to reshape many of the social conventions around marriage and family, parenting, and workplace ethics. What will become of them now, as they approach what have been euphemistically called the “golden years” and move from there into old age? What impact will they have on the civic life of the nation? What will be their lasting effect on the lives and institutions they have touched along the way?

The aging of the boomers and its implications have hardly gone unnoticed. Many traditionally middle-aged, even late middle-aged, concerns have taken hold of the public’s consciousness as the boomers have confronted them, from worries about male sexual function to questions about the reliability of pension funds or the adequacy of savings for retirement. But it is the thought of what’s to come that has prompted the most reflection. What will happen to society when, in the not-too-distant future, an estimated 20 percent of the U.S. population will be over the age of 65?

What prompts this more serious deliberation is the confluence of three demographic trends:

**Table 1-1: Life Expectancy**

Year	at birth	at 65 years
1900	47.3 yrs	no data
1950	68.2 yrs	13.9 yrs
1970	70.8 yrs	15.2 yrs
1990	75.4 yrs	17.2 yrs
2001	77.2 yrs	18.1 yrs

*Source: Adapted from the U.S. Department of Health and Human Services 2003.*

could expect to survive to their late 60s. Since then, an additional nine years have been added to the predicted life span, now over 77 years at birth (Table 1-1). Much of these recent increases reflect increased longevity in life's later years rather than improved survival in the younger years. Boomers who reach 65 in 2011 can expect to live, on average, at least another 18 years (U.S. Department of Health and Human Services 2003).

- **First, numbers:** About 77 million babies were born in the United States during the boom years of 1946–1964, about 26 million more than during the prior 18-year period, and about 10 million more than in the 18 years following the boom (U.S. Department of Health and Human Services 1999).
- **Second, longevity:** Those 77 million boomers are much more likely than their predecessors to survive into old age. Until the 1930s, life expectancy (at birth) was under 60 years. By contrast, children born during the boom years

Taken together, these three trends explain the recent public focus on demands that aging boomers will place on limited public and private resources, as well as on potential negative intergenerational effects of such demands. On the other hand, boomers will enter later life with many relatively healthy, productive years ahead. As some of the demands of work and family that have commanded their attention in mid-life recede, they have the potential to become a social resource of unprecedented proportions by contributing to the civic life of their communities. This possibility offers a way to reframe public discussion about the implications of the aging baby boom, shifting the focus from the frailty and dependency long associated with old age to an image of active, productive aging that comes with improved health and longevity. Seen in this light, the generation that has challenged social conventions throughout earlier stages of life now stands poised to redefine life's later stages and possibly “transform” the nation in the process (Freedman 1999).

It is this latter possibility that intrigued the sponsors of the Harvard School of Public Health–MetLife Foundation Initiative on Retirement and Civic Engagement and prompted them to convene the “Conference on Baby Boomers and Retirement: Impact on Civic Engagement” (Cambridge, Massachusetts, October 2003) and prepare this Report. It is an interesting possibility, both because it speaks to social needs of the larger community in the 21st century and because it offers those who count themselves as part of the baby boom generation a new opportunity to shape their social legacy.

This Report is, in part, the product of the Conference. It draws on three background papers that were prepared for the Conference (which are presented at the end of this Report) and on Conference presentations by Mei Cobb, Senior Vice President, Infrastructure Development and Delivery Systems, and Christopher Johnson, Manager, 50+ Volunteering, Points of Light Foundation & Volunteer Center National Network; Harry R. Moody, Ph.D., Director, Institute for Human Values in Aging, and Senior Associate, International Longevity Center; Robert Prisuta, Ph.D., Research Director, Environmental Analysis, Knowledge Management Membership Group, AARP; Robert D. Putnam, Ph.D., Peter and Isabel Malkin Professor of Public Policy, and Founder, Saguaro Seminar: Civic Engagement in America, John F. Kennedy School of Government, Harvard University; Joseph Quinn, Ph.D., Professor of Economics and Dean, College of Arts and Sciences, Boston College; and Maria Vesperi, Ph.D., Professor of Anthropology, Division of Social Sciences, New College of Florida. Most importantly, the Report draws on the observations, reflections, and shared experiences of the invited Conference participants.

The purpose of this Report is not to summarize those proceedings. Rather, it seeks to use the Conference and its associated papers as a springboard to further public dialogue. The Report examines the demographics of the boomers, trends in workforce participation and retirement, and patterns of volunteering. Given these trends, the Report presents a vision of the future that offers boomers both the incentive and opportunity to participate in community life. It considers the infrastructure, language, and images needed to support this vision, and concludes with a set of recommendations and ideas for further discussion. At the onset, a few points deserve emphasis:

- The “baby boom” is not a single homogeneous social entity. It is made up of several different generational cohorts, each with its own somewhat distinctive stamp. There is also far more cultural, economic, and social diversity among the boomers than there was among generations of Americans who came of age in the 1940s and 1950s. Unanimity of purpose, values, needs, or attitudes among such a diverse group of people cannot be assumed just because they happened to be born within the same 18-year span.

- The concepts and language of the past may be inadequate to the task of envisioning the future. Words such as “work,” “retirement,” “volunteer,” and all the language related to aging (such as “seniors”) oversimplify a complex reality, and may serve as barriers to change. It is a challenge to transcend the limits of past language as alternatives for the future are contemplated. In particular, the use of the term “volunteer” can be problematic. In common usage, the term implies doing something without financial compensation as part of a formally structured activity. However, this narrow sense of the term excludes many socially useful activities in which many people do engage. Therefore, in this Report the term is used in a way that is closer to the dictionary definition of the word, which emphasizes the notion of doing something voluntarily, of one’s own free will or consent, rather than as part of a legal obligation. The “unpaid” sense of volunteering is less important to this discussion (except in the sense that pay implies a contractual obligation), as is the notion of a formally structured activity. “Service” or “helping” do, however, remain important connotations. Throughout this Report, then, to “volunteer” means to do of one’s own free choice or consent something that has some component of service or helping to it. In this sense, volunteering has value both to the individual (because of its association with autonomy, choice, and free will) and to society (because of the component of service). It may include formal volunteering through structured service as well as informal volunteering, such as helping neighbors. And some “volunteers” may be paid something to help defray their expenses or make it possible for them to take time away from paid employment.
- The age range among the boomers also suggests that the impact of their aging will be felt for many years to come, and that the social landscape will change progressively over decades. This Report focuses on the near future, as boomers move into their 60s. But the more dramatic impact may come 20, 30, or 40 years hence, as large numbers of boomers near the end of their lives and begin to confront the increasing frailty of older old age.

## 2

# The Future of Working Life and Retirement

Conceptions of “work” and “leisure,” as sociologist Phyllis Moen has pointed out, took on new meanings in the industrialized world (Moen 2003). Notwithstanding the value that the ancient Greeks attached to leisure as a pathway to the ideal contemplative life, leisure as a reality was virtually unknown to most people in preindustrial society. Ironically, it was the industrial world, which exalted work as a virtue in its own right, that also introduced leisure to the masses. Throughout most of the 20th century, the unmistakable trend was towards shorter work weeks and more defined time off from work (including bank holidays, paid vacation, and, most importantly, the weekend).

**Table 2-1: Labor Force Participation Rate Among Men**

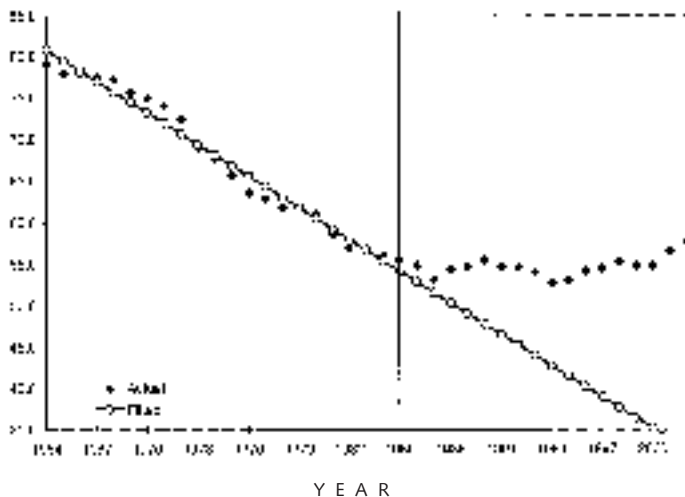
Age	55	60	62	65	68	70	72
1950	91%	85%	81%	72%	58%	50%	39%
1960	93	86	80	57	42	37	28
1970	92	84	74	50	38	30	25
1975	88	77	64	40	24	24	23
1980	85	74	57	35	24	21	17
1985	84	71	51	30	20	16	15
1990	85	70	52	32	23	17	16
1995	81	69	51	33	22	21	16
2000	80	66	53	36	28	20	18
2001	82	69	54	37	24	23	16
2002	82	68	57	39	30	18	19

Source: Quinn 2003.

In this vein, retirement, too, was largely a 20th-century creation, and the trend throughout most of that century was towards earlier retirement (Burtless and Quinn 2001; Quinn 2002, 2003). From the late 19th century on in the United States, the rate of participation of older men in the work force began to decline steadily. At the beginning of the 20th century, well over half of men in their

early 70s were still active in the work force. After the introduction of Social Security in the mid-1930s, however, which established 65 as the age of eligibility for public pension benefits, more men began retiring in their mid 60s. By 1950, fewer than half of all men 65 or older continued to hold jobs or actively look for them. By 1985 only about 16 percent of all men over age 65 were still in the labor force. When the age of eligibility for Social Security was lowered to 62 in the 1960s, the trend towards earlier retirement became even more pronounced. If the average age of retirement is defined as the age at which labor force participation drops to 50 percent, then the average age of retirement for men, which was in the mid 70s at the beginning of the century, dropped to about 70 years of age in 1950, to age 65 by 1970, and to 62 years of age by 1985—this at a time when more and more people were living into their 60s and 70s (Table 2-1).

**Figure 2-1: Labor Force Participation Rates of Males Aged 60-64**



Source: Quinn 2003.

The combination of increased longevity on the one hand and ever earlier retirement on the other is what many people have in mind when they think about the implications of the boomers' later years. But the picture is more complicated. What is most remarkable for the purposes of this discussion is that the closing decades of the 20th century brought a noticeable shift in these century-long trends (Quinn 2002, 2003). Working people in the United States have been putting in more hours of work, on average, rather than fewer—more than their counterparts elsewhere in the industrialized world, and now more even than the Japanese. Since the mid-1980s, the trend towards earlier retirement has also been changing. Not only are men no longer retiring earlier and earlier, but the participation of older men in the work force has actually increased slightly since the mid-1980s (Figure 2-1). The average age of retirement has also risen slightly. For women, the longer-term trends prior to the mid-1980s were a little less clear, given the combined effect of their increased labor force participation overall since World War II and earlier retirement. Nevertheless, the same shift is apparent after the mid-1980s, with a noticeable increase in labor force participation among women in their late 50s and early 60s (Figure 2-2).

This apparent reversal of long-term trends in the United States may be partially due to the strong economy of the late 1980s and early 1990s, which created an increased demand for labor among

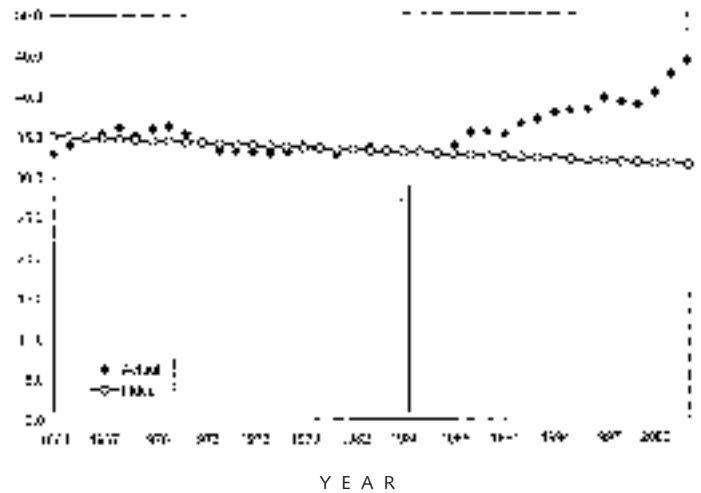
all age groups. However, there are compelling reasons to suggest that the trends in retirement may also reflect underlying structural changes that may have a longer-lasting effect. Among these has been the end to mandatory retirement, which once applied to half of the work force in the United States. In the late 1970s, the earliest age of mandatory retirement was delayed from 65 to 70; in 1986, it was eliminated altogether for the vast majority of American workers. Changes in Social Security have also reduced or eliminated the disincentives to continue working past age 65. The age at which one is eligible for full Social Security benefits has been delayed from 65 to 66 and will move to age 67 in the

near future. On the private side, the shift from defined benefits pension plans towards defined contribution plans (such as 401k plans) has had a similar effect, reducing previous disincentives to work beyond the minimum age of eligibility for benefits. In the mid-1970s, only 13 percent of those who had retirement coverage had their primary coverage in a defined contribution plan; that proportion rose to 40 percent by the 1990s. If boomers have not saved adequately for retirement, as many believe, then the incentive to work longer may increase in the years to come. Improvements in the health and longevity of older people and the less physically demanding nature of most jobs compared with those of earlier generations may also make it easier for the boomers to work longer than their predecessors.

The manner in which people leave the work force does not always translate simply into “retirement” in the customary sense. Between one-third and one-half of people who leave their full-time career jobs move into what have been called “bridge jobs”—that is, full- or part-time paying jobs other than those in which they spent the better part of their working years and that presumably “bridge” the transition from work to retirement (Quinn 2002, 2003). Still others leave the work force entirely for a while and later return. What’s more, as many as half of current retirees left the work force earlier than they planned or wanted to, most often because of poor health or adverse economic events, such as plant closings, layoffs, or downsizing (Prisuta 2004).

If expectations regarding the boomers’ forthcoming retirement are based simply on the major trends of the 20th century—less work, more leisure time, earlier retirement—they may be misleading.

**Figure 2-2: Labor Force Participation Rates of Females Aged 60-64**



Source: Quinn 2003.

Instead of retiring en masse in their late 50s or early 60s, boomers may continue working longer and move gradually towards complete retirement, zigzagging along the way. The year 2011, when the first boomers reach 65, may be less of a watershed year than anticipated if the connection between age and retirement, especially the connection between the specific age of 65 and retirement, continues to erode.

As suggested above, retirement for some is not voluntary, and many of those who find themselves out of work in their mid or late 50s may not readily find other employment in their usual line of work. “Bridge jobs” for these people may represent an unwelcome but necessary step down the economic ladder rather than an easy transition to retirement. Although much has been written about the meaning of work and its importance to self-esteem (Moody 2001; Morrow-Howell

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2000; Mark and Waldman 2002), the evidence suggests that attitudes towards work vary, depending on the nature of the job and individuals' perceptions of autonomy and control. What motivates people either to continue working or to retire likewise varies. Those who continue working in their later years tend to be clustered at either end of the socioeconomic spectrum: Some at the upper end work even when they could afford to retire, presumably because they

derive satisfaction from their work, while many at the lower end work primarily because they cannot afford to do otherwise. People with less satisfying work appear to choose retirement (and exercise options for early retirement) as soon as they can afford to do so (Quinn 2002, 2003).

Overall, the boomers' continued participation in the work force beyond what has come to be regarded as the “normal” age of retirement may be a good thing for society since it will allow them to participate longer as contributing taxpayers and maintain the social networks that will keep them connected and engaged (Burtless and Quinn 2001).

Given these trends, how realistic is the commonly held view of a future with large numbers of healthy retirees who have the means and the leisure time to give back to the community by volunteering? This topic is addressed in the next chapters.



## 3

## Social Capital: Will Boomers Be Different?

Volunteering is not an isolated activity. Instead, it is a reflection of an underlying quality of social connectedness that may manifest itself in many ways: through work or social life, formal community service or informal helping, secular civic engagement or faith-based good works. Social connectedness is also strongly associated with the health and welfare of the individuals in a community, which is a necessary precondition for engaging in community service (Berkman et al. 2000; Fried et al. 2004; Rowe and Kahn 1998). A critical question, then, in relation to the aging boomers' potential as a community resource, is the extent to which they will embrace or enhance this quality of social connectedness. This is where the real promise of improving the quality of community life lies, played out through a variety of mechanisms, both formal and informal, structured and unstructured, organized and unorganized.

Political scientist Robert Putnam and others have described this tapestry of social connections as the "social capital" of the community. At a basic level, this refers to the network of social relationships that people have to draw on (Winter 2003). Individuals benefit from social capital in proportion to the scope and cohesiveness of their social networks, which may connect them to mentors or job opportunities in their younger years, to people who can keep an eye on the house or the children, or to friends or neighbors who can simply help out when needed. In the aggregate, at the community level, social capital refers to what Putnam has called the "generalized reciprocities" that foster connectedness across the community (Putnam 2003). It is this degree of generalized reciprocity and connectedness that deeply influences the community's quality of life by whatever indicators one might choose, from crime rates to student performance in school to the health and longevity of the citizenry. The benefits of social capital, both to individuals and to communities, derive not so much from the direct services that result from it, but from the very sense of connectedness that it fosters. In this sense, what people do matters less than the fact that they are engaged and that they belong (Putnam 2003).

What is known about social capital among the boomers? Putnam and others have identified a constellation of behaviors that serve as proxy indicators: for example, membership in civic or community organizations, voting behavior, newspaper readership (or watching the news on television), church membership, and volunteering. Some behaviors may change as people age. But behaviors related to most of the critical indicators of social capital that Putnam has identified—voting behavior, for example, or newspaper readership—are adopted relatively early in life and do not change substantially with age. These, then, are the indicators that tell us the most about generational cohorts and, in this case, the likely behaviors that the boomers will carry with them into older age.

What is most striking, first of all, is the behavior of the boomers' parents. They were the generation that grew up during the Depression, went through World War II and Korea together, went to college on the G.I. Bill, spread out into the suburbs in the postwar years with the help of F.H.A. home loans, and had the children who became the baby boom. That generation, which Tom Brokaw has dubbed the "Greatest Generation," indeed stands out (Putnam 2003; Lenkowsky 2002). Everything that one can think of that relates to community service or social engagement they have done in spades and have continued to do throughout their lives.

The oldest boomers and the pre-boomers exhibit some of these same characteristics. But overall, the rank and file of the generational cohorts that followed have decidedly not followed in their parents' footsteps—in fact, just the opposite. By every measure of engagement one can think of, they do less: They vote less, read newspapers less, are less apt to join churches or civic organizations. This holds, Putnam has found, even for informal indicators of connectedness. The boomers, on the whole, go on fewer picnics and spend less time with their families. In what has become one of Putnam's most famous observations, they go bowling more than their parents did, but they do not join bowling leagues—instead, they bowl alone (Putnam 2000).

What is the explanation for this phenomenon? The boomers' early critics called them spoiled, over-indulged, and self-indulgent. They were a "do-your-own-thing" generation that took status and privilege for granted, without appreciating their social foundation. Some even blamed changing patterns of child rearing inspired by Dr. Benjamin Spock for what they saw as the generation's deficient character. Were these critics right?

To be fair to the boomers, the divisiveness of the times that they lived through in their formative years must be acknowledged—the war in Vietnam, the combative struggles over civil rights, political assassinations, Watergate. This is in sharp contrast to the unifying national struggles of the

1930s and the 1940s (as well as the common enemy in the Cold War of the 1950s) that brought the members of their parents' generation together. In addition, because of new communications technology (television, computers, e-mail), electronic messages have supplanted much face-to-face social interaction in everyday life. But which is cause and which effect? Were these divisive issues symptomatic of a decline in social capital, or did they contribute to it?

Regardless of which came first, this generational difference speaks to how much the larger community has changed since the 1950s, when the Greatest Generation was coming into its own. The social cohesiveness of that time was predicated not only on the shared values and unifying experiences of that generation, but also on the relative homogeneity of postwar, middle-class (and mostly white) suburban America, in which racial segregation limited the variety of one's contacts. Postwar prosperity softened the most glaring disparities of wealth (at least in those same suburbs) and swelled the ranks of the middle classes. Tight immigration laws controlled total numbers of new immigrants and gave preference to Northern Europeans who could most easily "fit in." Many children of immigrants grew up with parents who avoided ethnic identities and energetically pursued Americanization for themselves and their children. Gender roles resolidified once the services of Rosie the Riveter were no longer required.

**By every measure of engagement one can think of, they [boomers] do less: They vote less, read newspapers less, are less apt to join churches or civic organizations.**

The social critics of those times pointed out the underside of postwar suburban society: pressures towards conformity, intolerance for things "un-American," the emergence of the "organization man." And what about those who were excluded? Cohesiveness within the African-American and Hispanic communities was also predicated on a set of common interests, but one that derived from their shared experience of exclusion from the dominant culture.

Today's reality is very different. There are greater disparities in wealth and much more religious, cultural, and ethnic diversity in just about every part of the country (urban, suburban, or rural) than there have been at any time since the early decades of the last century. Immigration, now at near-record levels, is bringing unprecedented numbers of new arrivals from Asia, Africa, and Latin America, adding new cultures to the proverbial American melting pot. Society may have lost a sense of cohesiveness in the face of this new diversity, but it has gained exposure to a much broader array of ideas and lifestyles than was known in the past. The decline in social capital

reflected in the classic indicators of civic and social engagement may be due less to passivity or indifference on the part of boomers than to a perception that those traditional channels of engagement and the social foundation upon which they are based are not well suited to the realities of the present. In this sense, trends in social capital may represent a continuation of the generational break that became so apparent in the late 1960s.

One response to the diversity and fragmentation of contemporary life has been to design and create new, planned communities that appeal to people who have common characteristics or shared interests, and sometimes actively exclude those who do not. Sun City, Arizona is the prototype of the age-segregated community built around the concept of “active retirement” through the pursuit of leisure. Many others in Florida, Arizona, and elsewhere have followed in the wake of Sun City’s success (Freedman 1999). In a different vein, Celebration, Florida, developed by Disney, is perhaps the best example of a planned community designed explicitly to capture and market the sense of community and civic engagement characteristic of the past (Vesperi 2003). Elsewhere, gated communities seek to preserve the quality of life of those inside by erecting physical barriers to uninvited outsiders.

Interestingly, some planned communities do seem to have generated a kind of community spirit, perhaps reflecting the lifestyle preferences of those who move there. Their citizens volunteer more, take part in more community activities, and clearly enjoy a sense of connectedness that they often found missing from their lives elsewhere (Freedman 1999; Moody 2003). But they sometimes do not seem to care very much about those who live just beyond their community’s boundaries. Volunteerism may be up, but what people volunteer for are neighborhood patrols to enforce the community’s rules and keep out undesirables. Citizens in age-segregated communities may be active in local politics, but it is often in pursuit of a political agenda that will exempt them from responsibility for “other people’s children.”

Will this be the legacy of the boomers, or is there a way to rebuild a sense of community on a different foundation? And if the foundations of social capital are established early in life, is it too late for the boomers, who didn’t grow up that way? Or is it still possible that they might lead the way for the generations to come? Do boomers themselves expect to volunteer when they retire? These questions will be explored further in the next chapter.

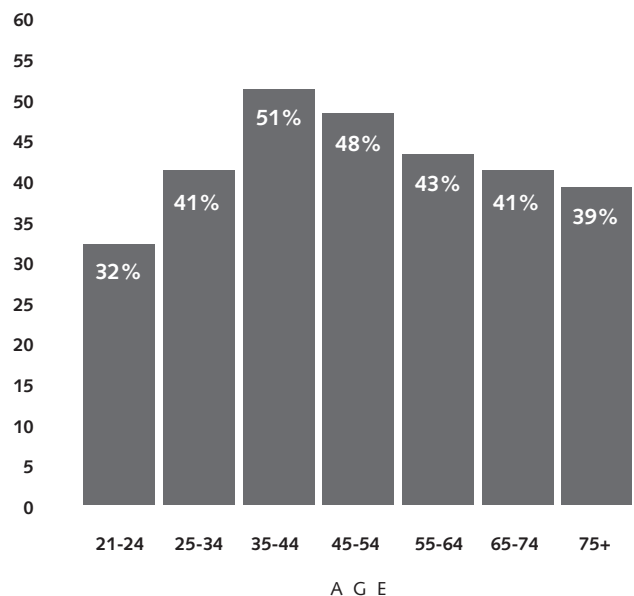
## 4

# The Outlook for Volunteering

This chapter first reviews what is known about patterns of current volunteering in the community—when people volunteer and what kinds of volunteer activities they do—to see what light this sheds on the likely behavior of aging boomers. It then looks at what boomers themselves say about what they expect to do in retirement and how they envision their own future.

Although conventional wisdom holds that people volunteer in greater numbers and with greater frequency as they move into their retirement years, this is only partially true. The percentage of people who volunteer actually reaches a peak during mid-life and gradually declines with age (Figure 4-1) (Prisuta 2003, 2004). The explanation for this is suggested by what it is that people volunteer at and what induces them to volunteer. The most common activities associated with the peak years of volunteering are extensions of parenting, such as volunteering related to school (PTA, class trips, fundraising) or to child-related non-school activities (youth sports or scouting). Across all other age groups, volunteer activities are more commonly faith-based. The biggest single inducement to volunteer is being asked by someone with whom one has an established relationship. Thus, volunteering tends to be an extension of one's family, work, and social life, rather than something apart from it. After retirement, people are less likely to be asked to volunteer and, consequently, are less likely to do so.

Figure 4-1: Percent of Adults Volunteering by Age



Source: Prisuta 2003.

On the other hand, those who do volunteer during their early retirement years tend to do so with greater frequency than during their working years. Moreover, the propensity to volunteer can vary from one generational cohort to another. Thus, the boomers' parents show an additional peak in the frequency of volunteering in their 70s, but this second peak was not observed in the preceding generation and thus may reflect the present older generation's life-long pattern of heightened civic engagement. Whether the boomers will follow in their parents' footsteps remains to be seen (Putnam 2003).

What people do when they do volunteer may not always equate directly with helping or service to the broader community. Social or special-interest clubs or organizations may have a service component to them, but many of these clubs and activities also serve very much as a social outlet for participants. Even in organizations that do have an explicit service mission, volunteer activities may focus more on perpetuating the organization (through fundraising, for example, or performing administrative

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functions) than on front-line service to the community. Still, membership in any organization enhances the social networks and community connections that foster volunteering, as well as the connectedness that leads to increased informal helping and mutual assistance.

Most of the existing data on trends in volunteering over the life span primarily reflect patterns of formal, structured volunteering, rather than informal volunteering or helping that falls outside of any official volunteer structure. This latter sort of helping, however, is fairly common among many groups, including African-American and Hispanic populations, who often do not regard it as "volunteering" per se (and therefore are not likely to report it as such on a survey). Might it not be possible that people engage more in this sort of informal helping as they get older? Available data suggest not. The activities reported on surveys that increase most in the retirement years are more often those associated with leisure—sleeping, watching television, or doing nothing in particular. This finding, too, suggests disengagement and even social isolation, conditions not likely to foster helping behavior (Prisuta 2004; Johnson et al. 2004).

The one helping activity that does appear to increase with age, however, is caregiving, especially caring for an elderly parent or a spouse in failing health. For some this might constitute informal volunteering; for others it is perhaps more a reflection of family obligation than an essentially voluntary activity. In any case, the demands of caregiving, as well as personal health problems, are reasons older people often give for not being able to volunteer more or for cutting back on existing activities. The underside to increased longevity is that as more people survive into old age, more of them will experience various chronic and degenerative illnesses. If anything, then, caregiving demands on families are likely to increase in the coming years unless new community-based resources are developed (Prisuta 2003).

This snapshot of current volunteering (and related) behavior across the life span reveals that people do not automatically volunteer in greater numbers just because they have the time, even though lack of time is often cited as an excuse for not volunteering. Instead, as indicated earlier, volunteering in mid-life seems to be associated with having more, rather than fewer, obligations and commitments and with being actively engaged in other aspects of life, such as working and parenting. This makes it somewhat difficult to predict what the net impact of the boomers' aging will be. There will be more of them, yes, but fewer may volunteer in their older years than they are now doing, even though those who do volunteer may do so with greater frequency. Thus, as they move out of their middle, peak volunteer years, the boomers may leave behind a net deficit in the total supply of volunteers. And yet, if they remain active in the work force longer, as suggested earlier, perhaps they will stay more actively connected to the kind of social networks that foster volunteering. This, in turn, may have a salutary effect on their health, given the strong correlations that have been demonstrated between social engagement and health and longevity (Berkman et al. 2000; Fried et al. 2004; Rowe and Kahn 1998).

As noted earlier, the boomers' future cannot be predicted simply on the basis of an earlier generation's behaviors. One particular wild card that the boomers will bring with them relates to the changing role of women. Current and past patterns of volunteering appear to have been shaped by traditional gender roles. Women have volunteered in far greater numbers than men, both formally and informally, and across all age groups. This may be because middle-class women, especially, have participated in the work force (outside of the home) at lower rates than men and have therefore had fewer competing job-related demands on their time. It may also be because women have traditionally played the role of nurturers and family caregivers and have viewed volunteering as an extension of this role. In either case, the blurring of traditional gender roles among boomers may shift this pattern in unpredictable ways. With more women working and remaining in the work

force longer, the pool of female volunteers may be reduced. On the other hand, as suggested earlier, their ongoing connections to larger social networks and institutions may be greater than those of their predecessors. And, as the demands of caring for aging parents or spouses increase in later life, it remains to be seen whether those men who have taken a more active part in caring for children in their earlier years will step up to the plate when it comes to caregiving functions in later life. Women's ability to continue contributing to the life of the community as they age will depend on their having both the financial and social supports that will allow them to do so.

Another way to approach the question about what the future may hold is to ask boomers themselves what they think they will be doing in retirement. Survey researchers from Roper-ASW, in collaboration with AARP, put this question to a sample of boomers and identified five broad categories (Table 4-1) (Prisuta 2004).

Among the five categories, the survey found two extreme groups, both of which seem unlikely to yield substantial numbers of volunteers. At one end of the social spectrum are nearly one-third of survey respondents (the "Strugglers" and the "Anxious"). These groups are disproportionately female and are not looking forward to retirement. They expect that they will have to struggle just to make ends meet, or they have serious worries about their health. They are not likely to have the time or resources to do much formal volunteering, although they may be able to establish some sort of *quid pro quo* that allows them to give and get informally. At the other end of the spectrum, about 13 percent of survey respondents (the "Enthusiasts") are looking forward enthusiastically to their retirement. Well-off financially, they look forward to the leisure they feel they have earned and deserve. They have the time and the resources that would allow them to volunteer, but they do not envision their retirement that way. Of course, people are known to change after they have been retired for a while, to become bored and start looking for something substantive to do. So they, too, should not be entirely discounted. Still, these groups at either end of the spectrum must be regarded as a limited resource, albeit for very different reasons.

Falling somewhere between these two extremes are two fairly sizable groups ("Today's Traditionalists" and the "Self-Reliants"), accounting for slightly over half of all survey respondents. What distinguishes them from the others is how they see themselves in relation to the rest of the community. The "Self-Reliants"—affluent, educated, and healthy—pride themselves on their independence. Unlike the "Enthusiasts," however, they still expect to be connected to the community through work or community service during retirement. The "Traditionalists"—far more typical of the boomers as a whole in terms of their financial resources and their demographic diversity—are more likely to



### Table 4-1: Baby Boomers Envision Their Retirement

**The Strugglers (9%)** – Few financial resources, very pessimistic about their future. Primarily female, not married, low education and income levels, and less likely to be employed. Likely to have suffered an adverse life event, such as divorce, job loss, or major illness. Less likely to describe their health as “good” or “excellent.” Have virtually no money saved for retirement and expect to have to work to make ends meet or rely on Social Security for retirement income.

**The Anxious (23%)** – Some retirement savings, but not enough to instill confidence in their future. More stable employment than Strugglers, but especially concerned with health care issues. Self-reported health status somewhat lower than the boomers in general. Also slightly more likely to be female, not employed full time, with slightly lower income and education levels. Less likely to see retirement as a time for increased travel, recreation, or community service, and more likely to see it as a time of hardship.

**Today's Traditionalists (25%)** – Middle income with moderate retirement savings. Tendency to expect more intergenerational family support. Comes closest to matching overall boomer demographic profile in terms of education, income, employment, health status, and gender. More ethnically diverse than other segments, with higher incidence of African-Americans and Hispanics. More confident in aging entitlements than boomers in general. Also expect to work in retirement for variety of reasons.

**The Self-Reliants (30%)** – Economically upscale, with significant retirement savings. Differ from Enthusiasts in their anticipation of being more connected to the community through employment or community service. Higher than average anticipation of doing more volunteering during retirement. More likely to be married, well-educated, with higher income and higher reported health status. Plan to continue working part time for interest and enjoyment, if not for financial reasons.

**The Enthusiasts (13%)** – Upscale segment with significant retirement savings. Optimistic about retirement, which they anticipate to be time to be free of work and responsibilities, enjoy hobbies, travel, relax. Do not plan to work in retirement and anticipate income that is more than sufficient. More likely to be male, married, but income and education levels are similar to boomers as a whole. Report higher levels of health. Less likely to anticipate volunteering in retirement than boomers in general.

*Source: Adapted from Prisuta 2004.*

acknowledge their interdependence and to be a part of the social networks that support informal volunteering. Both of these groups expect to remain involved in the community, through work and/or service, and both have a generally positive outlook towards the future.

What do these findings imply for the potential impact of the boomers' retirement (or semi-retirement) on the life of the community? The evidence is clearly mixed. Current patterns of volunteering across the life span suggest that fewer boomers may be involved in community service as they get older. Their ability to contribute to the community will depend in large part on their health and financial status and the family and social supports available to them. More than half of them

**The biggest single inducement to volunteer is being asked by someone with whom one has an established relationship. Thus, volunteering tends to be an extension of one's family, work, and social life, rather than something apart from it.**

expect to remain involved in the community through work or community service, which is a promising sign. And, their numbers are so large that recruiting even a small percentage of boomers for meaningful volunteer service in their later years could have a profoundly beneficial influence on local communities and on society as a whole.

## 5

## An Alternative Vision of the Future

The renowned social psychologist Erik Erikson posited eight stages of life, each associated with successive tasks of ego development, and each associated with successively expanding circles of human relationships. The principal task associated with later adult life, after the “generative” tasks associated with the middle adult years (such as work and parenting) have subsided, is what Erikson called establishing “integrity”—that is, achieving meaning in the whole of one’s life, connecting to humankind as a whole (Erikson 1980).

From the vantage point of the 1950s, when he first began to develop his taxonomy, Erikson saw these later adult years as the eighth and final stage of life (from roughly ages 55 to 65 until death). He regarded the task of coming to terms with one’s life primarily as a retrospective one of looking back, taking stock, acknowledging the choices one has made along the way, and figuring out how it all makes sense. Failing to do this, he observed, leads to despair. The need to find meaning in life’s later years and the consequences of failing to achieve it may explain two phenomena associated with older age: first, increasing membership in organizations of faith (the only membership that does appear to increase in life’s later years) and second, a rise in disengagement, isolation, and depression (Prisuta 2004).

But consider what the boomers will face as they leave mid-life behind them and move into what some have called the “third age” of life. Unlike those individuals Erikson initially had in mind, they will still have another 20 years or so to live. That is a long time to spend looking back, much too long a time. Is it any wonder, then, that older people now try so hard to postpone this reckoning, either by staying active in the work force or through the sometimes frenetic pursuit of structured leisure-time activities in retirement communities? Embracing such forms of active, productive aging keeps the bogeymen at bay (Moody 2003).

The boomers may also extend their stay in the earlier stages of life, much as they have done throughout their lives. Their adolescent search for identity extended well into their 20s, and they

have pushed the limits of childbearing about as far as ticking biological clocks will allow. Ultimately, however, they will still face the challenge of making meaning of their lives in the now prolonged years of late adulthood.

In his earlier work, Erikson paid less attention to this latter phase of life than he did to the earlier ones (he devoted five of his eight life stages to childhood and adolescence). Later in his own life, however, he and his colleagues recognized the dilemma that the changing demographic reality was creating. “If the prevailing conditions are not rectified,” they wrote, “the present working men and women of the world will be looking forward to an initial retirement holiday followed by a dangling and unproductive aging of many years’ duration” (Erikson, Erikson, and Kivnick 1986). They urged those in their 50s to meet this “very urgent challenge squarely,” and to consciously anticipate their old age.

Two lines of argument suggested by Erikson’s analysis are especially germane to this discussion:

- First, late life, like earlier stages, can and should be seen as a stage of development, not just as an endpoint. There is a psychic mission to be accomplished. Thus, the principal task of establishing integrity in one’s life can be viewed as prospective and constructive, rather than as retrospective. The added years that the actuarial tables now predict create an opportunity to find integral meaning by doing something more rather than simply looking back and taking stock.
  
- Second, the world that one relates to and must come to terms with gets bigger as one moves through life. It starts with the immediate circle of parents and family during childhood, expands to include peers during adolescence, and by the adult years includes intimate partners, children (or the next generation), colleagues, and the broader community. In late adulthood, disengaging from the immediate demands of parenting and work life can allow people to shift their focus in the direction of broader and broader circles of engagement. Erikson and his colleagues spoke in terms of “humankind,” and the need to become “integral coworkers in community life” (Erikson, Erikson, and Kivnick 1986).

These arguments suggest an alternative vision of the future, one that gives the boomers both the incentive and an unprecedented opportunity to direct their energy towards a positive social purpose,

to create an apt and enduring legacy. Realizing such a vision entails, first of all, approaching the years of late adulthood as a new process of becoming. It also requires creating an expansive sense of community that helps individuals connect to wider circles of humanity. The boomers might just be equal to this challenge. As a group, they are far more culturally diverse than their parents' generation, and they have grown up in communities and institutions that have been far more diverse than their parents ever knew. In this sense alone they are in a position to pave the way for the generations to follow, which are even more diverse. Consider how boomers have already reshaped society. The policies and practices that have evolved during their tenure as adults far better accommodate girls and women, minorities, the disabled, and people of different cultural backgrounds and lifestyles. These changes have produced benefits not only for those initially targeted but for society as a whole. Men as well as women benefit from family leave and flexible work schedules. Men who lack family connections, as well as women and minorities, have benefited from the weakening of the "old boy" system. The able-bodied as well as the disabled benefit from the redesign of public buildings and common public spaces. Certainly, inequities and deep divisions still exist. But boomers have already begun to redefine community in a more inclusive way that suggests something about future possibilities.

**These arguments suggest an alternative vision of the future, one that gives the boomers both the incentive and an unprecedented opportunity to direct their energy towards a positive social purpose, to create an apt and enduring legacy...approaching the years of late adulthood as a new process of becoming.**

This, then, is the foundation on which boomers in late life can rebuild social capital in a way that is relevant to the realities of the early 21st century. Putnam (2000, 2003) points out that, as a society, individuals faced (and, in many ways, met) a similar challenge during the early decades of the last century, when urban industrial life had radically altered the traditional foundations of community life. Meeting this challenge now requires a call to action that defines and builds on common ground, rather than on polarizing issues that divide people. In this sense, it does matter what boomers do, how they become engaged, and how they establish their "generalized reciprocities."

Where such common ground lies is suggested by the patterns of social engagement that effectively bring people together across the lines of income or social status, race or ethnicity, and political

leanings. In an ongoing study of neighborhood life in Chicago, researchers have found that what accounts for palpable differences in the quality of neighborhood life, including variations in rates of violent crime, are measurable differences in the “collective efficacy” of the residents. By this they mean a recognition that the people in the neighborhood have a common interest in monitoring the behavior of youth, looking out for other people’s children, and keeping an eye on each other and each other’s property. What’s more, they have found these qualities in neighborhoods that include people of different races, nationalities, and income levels, as well as in communities of more homogeneous compositions (Sampson, Raudenbush, and Earls 1997). Others have noted that it is intergenerational interests, such as caring for the welfare of children, the next generation, or dependent elders, that often hold the most promise for bringing people together (Henkin and Kingson 1999; Taylor and Dryfoos 1999). Most people place the welfare of families, children, and the elderly high on their list of community priorities. And as mentioned earlier in this Report, the most diverse and representative group of boomers cited in the AARP survey (those referred to as “Today’s Traditionalists”) acknowledged the mutual dependence of generations (Prisuta 2004). This, then, suggests the common ground on which a broader, more inclusive sense of community can be developed.

It also bodes well for the future that most boomers intend to remain in their accustomed home communities when they retire, instead of moving elsewhere (Prisuta 2004). Evidence suggests that people are more likely to remain involved in the life of the community in their older years if they stay put and are more likely to disengage if they move away (Prisuta 2004; Sampson, Raudenbush, and Earls 1997).

The infrastructure that will support this alternative vision of the future has yet to be built, although elements of it are already visible. It will require institutions that can support the transition from the middle adult years to late maturity, help the boomers define their connection to larger circles of humanity, and accomplish their generation’s psychic and social mission. The language and imagery that will inspire the boomers to envision their later years and give substance to the vision also have yet to be developed, although they are beginning to emerge. These topics are addressed in the next chapters.

## 6

# Building Infrastructure

Society does not yet know how to engage 77 million people in rebuilding social capital over a 15- or 20-year span of later adulthood. The demographic phenomenon that makes this vision possible is much too recent for society to have adapted, resulting in what sociologists call “structural lag” (Moen 2003). It is not simply a question of revamping existing voluntary or charitable institutions to absorb the boomers when they come. Nor is it only about keeping boomers busy, doing something that interests them in a way that has some marginal social value. Creating the infrastructure that will support and sustain the kind of vision that has been described may require creating new institutions, transforming existing ones, and rethinking traditional concepts of work, volunteerism, and what is appropriate for public and private spheres of authority (Cobb and Johnson 2003; Johnson et al. 2004).

Robert Putnam’s recent examination of activities that effectively build social capital at the community level reveals that government, especially at the state and local level, is a key partner in successful enterprises (Putnam 2003). Governments shape policies in ways that create more opportunities for paid and unpaid service work, provide facilities and start-up funds, and in many different ways serve as constructive partners to the voluntary sector. And yet for governments to take such action to engage the aging boomers would require a significant shift in public policy. Since the 1960s, the policy agenda around aging has focused almost exclusively on the dependency needs of elders, not on their potential as a community resource. Therefore, a strategy that relies solely, or even primarily, on government initiatives and government subsidies is not likely to be realistic.

There is a long history in this country of looking to the private, voluntary sector as the vehicle for the collective exercise of social responsibility. But voluntary organizations, as currently constituted, may not be equal to the challenge of engaging large numbers of older adults in meaningful service. Volunteer work is often undervalued, undermanaged, and offered on inflexible terms that suit the organizations, rather than the volunteers themselves. Indeed, many well-established and well-

managed volunteer organizations report that they could not easily absorb large numbers of new volunteers. If the boomers were to show up at their doors in droves, they might well be turned away (Cobb and Johnson 2003).

Likewise, existing community-service organizations have not always been very creative in designing volunteer opportunities. They have tended to think in terms of simple tasks that can be done without much planning or supervision, rather than in terms of the mission they are trying to accomplish

**...there is a compelling rationale for building a new infrastructure on the foundation of existing institutional loyalties and capacities, rather than seeking to create an entirely new basis.**

and how to use volunteers to achieve it. There are many accounts of underutilizing volunteers, such as the case of a retired physician who volunteered her efforts at a local community hospital, only to be offered a job refilling patients' water pitchers (Freedman 1999). If volunteers are to become genuinely committed, they must feel that they are a valued and integral part of the organization, not a group apart. It is exactly these more complex and sustained opportunities that will promote both personal growth and

social growth. Creating such roles, however, will not be easy. Very often, the job of volunteer coordinator in community agencies is marginalized or nonexistent. Likewise, the costs of managing volunteers often are left out of agency budgets or funding proposals (Cobb and Johnson 2003). Unpaid labor is a resource, just as paid labor is, but unpaid labor is not free. It must be planned, managed, organized, and coordinated, just as paid labor is—and this requires an investment of time and resources.

Faith-based organizations, which have traditionally served as the most extensive home base for voluntary community service in the United States, will most likely remain a critical component of any new infrastructure. Compared to many secular organizations, organizations of faith appeal to a broader spectrum of the population, including racial and ethnic minorities, immigrant populations, and people at varied income and educational levels. They are well positioned, therefore, to help provide the social connections that can link disparate members of the community together. Consider, for example, Habitat for Humanity, a faith-based organization whose wide appeal extends across the lines of age, religion, political orientation, gender, income level, ethnicity, and geography. Moreover, older individuals often turn to organizations of faith when they are searching for meaning in their



lives. What is key for this new vision of the future, however, is that faith-based organizations direct a significant component of their attention outward to the larger community, as well as inward to their own congregations and individual members.

Universities and other educational institutions have typically served the young. But, as demographics have changed, many of them are beginning to define their missions in broader terms as centers for life-long learning (Moody 2003). This potentially puts them in a position to support aging boomers as they make the transition to late maturity, exploring new areas and new possibilities as they leave behind some of the demands of full-time work and family.

Given the economic realities that many boomers will face, the discussion may need to move beyond volunteering per se. Paid work may be a significant component of the new infrastructure, for several reasons. Boomers are likely, as has been noted, to work longer. They are increasingly likely to leave the work force haltingly, moving from full-time career jobs to bridge jobs, sometimes out of necessity and sometimes because they want to stay engaged and active. At a time in their lives when they are beginning to take stock, many may welcome an opportunity to change pace, to do something they have not had the chance to do. Bridge jobs can therefore be a bridge not only to retirement but also to a new (or different) sort of social engagement. They can help potential retirees envision later adulthood in somewhat different terms.

In visualizing the opportunities for existing organizations to play new roles in the new infrastructure, it is also important to recognize that most organizations are resistant to change to some degree. Boards of directors, executives, administrators, and work forces are accustomed to responding to the exigencies of the moment (political, cultural, or economic), through established, tried-and-true routines and behaviors. For this reason, some observers have suggested that leadership for change must come from outside the existing organizations if anything more than incremental adjustments are to be achieved (Moen 2003).

Despite these difficulties, however, there is a compelling rationale for building a new infrastructure on the foundation of existing institutional loyalties and capacities, rather than seeking to create an entirely new basis. Institutional loyalties stabilize during mid-life. Younger people may experiment, but older individuals are far more likely to retain established memberships and affiliations than they are to form entirely new ones. They are also far more likely to respond to appeals that come from institutions that they know and trust (Prisuta 2004).

Given these conflicting imperatives, one promising strategy is to form partnerships that bring together the vision, leadership, energy, and flexibility characteristic of new organizations with the practical experience and engendered trust and loyalty of existing ones. The Amachi program, created by Public/Private Ventures, is an example of a new mentoring program that has reached out to a new clientele (the children of incarcerated parents) while drawing on the experience of an established program with a related mission (the Big Brothers Big Sisters organization) for guidance and training. In addition, Amachi has partnered with another strong traditional base for social engagement—established community churches—to recruit volunteer mentors. What makes this collaboration work is that the partners have been able to find an effective common ground based on their shared and overlapping missions, and build on each other's particular strengths (Jucovy n.d.).

The structures and mechanisms that will tap the potential of the aging boomers to serve as a resource to the community have yet to evolve. But, as boomers take up the challenge of creating something new out of this phase of life, the importance of individual initiative in communities across the country should not be discounted.

## 7

## Framing a New Vision of Aging

If we build it, will they come? Can it be assumed that boomers will take up the challenge, think creatively about the possibilities for their later years, and lead the way towards a new sense of community, a new form of civic engagement? And if some of their number try to lead, will anyone else pay attention, much less follow? The challenge of realizing an alternative vision of the future depends in part on reframing the images that surround such terms as “service” and “social engagement” and that reflect underlying perceptions of aging. As noted earlier, the concepts and language of the past are in many ways inadequate to the task. New language, imagery, and stories are needed that simultaneously reflect the changing cultural realities of the 21st century, evoke a new sense of what is possible, and engage both boomers and the general public in re-envisioning the role of elders and the meaning and purpose of one's later years.

Much of the current discussion within the volunteer community emphasizes the fact that the boomers are a generation of consumers accustomed to having their needs, tastes, and desires catered to in the commercial marketplace. The implication is that unless boomers perceive opportunities for service as being convenient and tailored to their particular individual interests, they may simply walk away from such activities in favor of something more appealing. Perhaps they will. But offering boomers a smorgasbord of convenient and attractive options for service may not, by itself, engage them in the ways that have been discussed. Their personal stake in social engagement has to be understood by them, and by society at large, as far more profound than amusement or diversion. Indeed, for many, their physical and emotional well-being may be strongly influenced by their ability to stay connected and to connect in new ways to the community around them, especially as they disengage from work and family-based caregiving. However, what might well sell them on, and engage them in, such service is the appeal of the mission of such enterprises, the recognized social need addressed, coupled with the realization that such service might also be in their own interest.

If social capital is to be built on a more inclusive sense of community, images of community service need to be reframed in a way that can more effectively expand the appeal of such activities across cultural and class lines. This requires moving beyond the language of noblesse oblige that sometimes characterizes charitable community appeals. The first word that needs to be reconsidered is the term “volunteer.” As suggested earlier, the term as commonly used does not convey the full array of possibilities, both paid and unpaid, that could be fostered as a way of providing service to the community. Further, those who work in African-American, Hispanic, and Native American communities have found that the term “volunteer” does not resonate well among those who may have found themselves the objects of paternalism in the past (Cobb and Johnson 2003). However, this does not mean that members of these communities are unwilling to help. While it is true that if agencies ask for volunteers from these communities they have found few will step forward, an appeal framed in terms of being willing to help people in need may be more likely to evoke a favorable response.

Indeed, helping others in the community, as well as acknowledging the need for help from others, is the norm in many close-knit communities. It is the basis for the sort of informal volunteering that is a natural part of much family, religious, and community life. Framing an appeal based on this recognized interdependence can help move away from the “us versus them” imagery that has stigmatized some voluntary efforts in the past. The notion of “giving back to the community” may thus have broader appeal than the more divisive image of “we have so much while others have so little.” A message acknowledging that everyone in the community has needs and that everyone in the community has something to offer can serve as the basis for a much more inclusive movement toward increased community service.

A certain kind of equitable inclusiveness is one of the great potential appeals of any effort to increase volunteerism. Not everyone can make a major gift to the local hospital or be on the “big donors” list of a political party. But many more individuals can help teach reading to schoolchildren, mentor adolescents, or help run a neighborhood recreation program. Volunteering (even if paid) can allow people further down the socioeconomic pyramid to participate in community life in relatively more equal terms.

Even with such efforts, however, it is important to bear in mind that fully half of the boomers responding to the Roper-ASW survey noted earlier did not envision civic engagement in their retirement years (Prisuta 2004). In fact, advocates in the field have been surprised to find fairly strong resistance among some of those who have worked hard for a long time and resent what

seems to them to be exhortations to continue working into their retirement. An on-line reviewer of the book, *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America* (Freedman 1999), dissented strongly from the overwhelmingly positive reviews posted on-line, saying he found the book's message "exhausting and depressing." He added, "I resist the message that, after having worked this hard, and paid plenty of SSA taxes to keep my elders financed in their retirement, I have to forego my own." Such sentiments have been expressed often enough that advocates have acknowledged that overwork and fatigue are two of the biggest barriers to achieving a vision of a nation transformed by retired boomers (Freedman 1999).

What many people value about retirement is recapturing a sense of control over their lives, no longer being bound by the contractual obligations of work. And those who embrace retirement as an escape from such obligations may not respond to calls to action that imply the need to accept a new set of constraints and commitments (Mark and Waldman 2002). Yet this does not necessarily translate into disengagement or alienation on the part of such individuals. The same *Prime Time* reader quoted earlier looked forward to traveling, gardening, studying art, and learning Spanish. What he clearly longed for, besides rest and relaxation, was the opportunity to "smell the roses"—to do something, at his own pace and on his own terms, that he had not been able to do before. "If I can touch some lives positively along the way," he concluded, "terrific." Part of the challenge society faces is to help him, and others like him, find ways to do just that.

## Images of Aging

This last point speaks to the need for creating new images of aging, new stories that can help people envision alternative futures for themselves and that can help the rest of society see seniors in different roles (Vesperi 2004, 2003). The media may prove both a challenge and an ally to this endeavor (Vesperi 2004; Kleyman 2002; Bergstrom 2002). The advertising industry has discovered the senior market and that images of frailty do not sell. It is not by accident that the actors and actresses who portray the elderly in television advertisements, even for products associated with

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physical impairment, such as incontinence products or nutritional supplements, are active, healthy-looking men and women in their late 50s or early 60s. The media thus are likely to both reflect and reinforce a positive value on continued vigor and activity at any age, even as they focus on a certain kind of consumption-oriented materialism (at least in advertising) as the expression of that vigor.

The news media, which have traditionally paid attention to aging as a social “problem,” have also begun to recognize seniors as an important audience in their own right and the issues that affect them as a legitimate focus of editorial attention, worthy of its own “beat.”

Given its role in storytelling across the social spectrum, the entertainment industry also may be a promising vehicle for conveying alternative images of aging. But seniors are currently the most underrepresented age group in the movies and on television, no doubt a reflection of the conventional wisdom that defines the ideal target audience as 18- to 35-year-olds. The challenge will be to incorporate new images of seniors and new stories about seniors into entertainment programming that has appeal across generations.

To combat the negative image of the frail, dependent elder that underpins the grim view of the future, society has perhaps too willingly embraced the contrasting image of the “active senior”—indefatigable, eternally young, busy traveling, consuming, and living in comfortable leisure. Both images have limited social value—the former because it marginalizes older people, seeing them only as a “problem” that needs to be dealt with—the latter because it creates unrealistic expectations and ignores or denies the central need to establish meaning and integrity in late maturity. Physical decline may accompany life’s later years (increasingly so as one ages), but do elders have value to society only to the extent that they remain youthful? Do they have nothing to offer by virtue of their age and experience? Stories are beginning to emerge that illustrate the variety of possibilities in this new stage of life (Trafford 2004), but more stories will be needed, stories about people who make a difference because they are willing to actively participate in community life.

## 8

## Next Steps

**This Report has identified hopeful signs of the boomers' potential to create a worthy social legacy in their retirement years. In addition, because community engagement can have a substantial impact on the mental and physical health of individuals (Berkman et al. 2000; Fried et al. 2004; Rowe and Kahn 1998), individual boomers stand to gain personally from engaging in the life of the community.**

Much will depend on the physical and emotional health of boomers as they age and their financial well-being. From the vantage point of their 50s, most boomers now have a positive outlook. But what will the coming years bring? Will their savings and defined contribution pension plans coupled with Social Security be enough to carry them through? Will their added years of life be healthy ones? Will they find the rest, relaxation, and emotional fulfillment that they look forward to? Not all boomers will enter later life with rosy prospects, and their health and welfare may change over time. Already, roughly one-third of them have serious worries about the future. The outlook for at least another quarter will likely depend on the family or community resources available to them, and on the future status of public programs, such as Social Security and Medicare.

In addition, there are barriers to overcome. The capacity to address the varied needs of aging boomers has yet to be developed. Likewise, communities have not yet developed plans to take advantage of the potential resource of retired boomers. Changes in infrastructure and policies will be needed across all sectors of society—public and private, for-profit and voluntary, faith-based and secular. And the process by which such changes occur may be slow, halting, and even contentious. Yet, boomers will not—and need not—simply wait for others to create such structures. Out of necessity, they will likely make something new and different of this new life phase, as they have done with earlier phases of life. The question is, what will they make of it? And what can be done in the meantime to reach across the social spectrum and help them envision a life that achieves meaning by connecting in new ways to the community around them?

The answers will lie with the decisions that individuals make within the context of their own lives, as they move through the process of defining themselves in late adulthood, and with the opportunities they encounter along the way. It will be a collection of personal decisions played out at the community level that will have a cumulative social impact for decades to come.

For many people, the biggest inducement to engage in community service is being asked to do so—especially by someone they know. Yet movements also need leaders—visionaries who are willing and able to start something new and to persuade others to follow. Some members of the oldest boomer cohort, who came of age in the 1960s, may serve as the innovators—the advance guard for social engagement in later life.

Realizing a new vision of the future for aging boomers will be a vast undertaking, continuing over many years. This Report cannot begin to capture the depth or scope of possibilities that will contribute to achieving such a vision. Nor can it do justice to the literature across many disciplines that has already explored the topics touched upon here, or the many efforts currently underway to address the issues raised here. This Report is intended to be suggestive and prompt further discussion—and creative experimentation—within communities across the nation. In that spirit, the following are suggestions for moving the process forward:

### **Create Diverse Opportunities for Social Engagement**

A range of opportunities is needed to allow people to engage in different ways at different times and at different levels of commitment. In addition, some individuals may prefer opportunities for civic engagement that do not involve working through an agency. Some will be more inclined toward “entrepreneurial volunteerism” or independent volunteerism. Such informal initiatives, which may tap the motivation, passion, skills, and interests of boomers, should be encouraged as a valued alternative to agency-based volunteer service. Relying only on unpaid work to address the social needs of the community leaves out those who lack the time or financial resources that would allow them to provide their services for free, and deepens existing divisions between the “haves” and the “have-nots.” Therefore, social engagement may also include services that are compensated or exchanged.



Many sectors of society can play important roles in moving the process forward:

- **Policymakers** can re-examine whether current public policies are aligned to support and encourage the participation of retirees in civic life.
- **National nonprofit organizations** in the fields of public health, social services, youth development, aging, and education can take the lead in helping local affiliates identify and develop volunteer opportunities to obtain services they otherwise would not be able to afford. Planning should take into account that individuals from a broad range of backgrounds and experiences can fill a wide range of useful roles.
- **Local nonprofit institutions** can expand their vision of how retired boomers can help them enhance their services and create flexible opportunities that will meet the needs of both boomers and the organization.
- **Employers** can make volunteer opportunities known to employees to enable them to try out public service roles while they are still working.
- **Local governments** can identify opportunities and provide support across their range of functions—health, education, recreation, and social welfare. At the same time, care must be taken to ensure that volunteer service is used to augment, and not substitute for, the jobs of public employees.
- **Faith-based institutions** can foster the social networks that encourage members to connect not only to each other, but to the larger community as well.
- **Special interest clubs** (such as chess, cooking, or gardening clubs) can expand their horizons through structured programs that reach out to the community—for example, by sharing their interests with young people through intergenerational programs.
- **Educational institutions**, as they begin to revamp their curricula to meet the needs of older adults as well as youth, can develop intergenerational learning and service opportunities.
- **Hollywood** can create new images of aging, new stories that can help people envision alternative futures for themselves and that can help the rest of society see seniors in different productive roles, such as volunteering.
- **News organizations** can spotlight the stories of first-wave and pre-boomers who are creating new paths in retirement that include volunteering. A trend in this direction has already begun.

- **Public and private funders** can support efforts to train and supervise boomers who step forward in retirement to volunteer. The management of volunteers is a distinct and important function that too often is left to chance. A volunteer manager can play a key role in seeing to it that the volunteer feels valued, and that there is a good fit between the individual's skills, interests, and time availability, on the one hand, and the needs of the organization on the other.

Many local agencies will not have the resources for professional volunteer management, so there may be a need for mediating institutions, or third parties, to handle the recruitment, training, and referral of boomers on behalf of a number of agencies in the community. This more elaborate mediating function could be performed by Volunteer Centers and existing institutions/programs in the aging services network, such as Senior Centers, Life Options Centers, and Senior Corps. However, to play this role, many of these groups will need to rethink and expand their missions. In addition, the Internet can be used to provide information on a menu of available volunteer opportunities to allow individuals to identify the right match.

## Develop Community-Wide Service Initiatives

One way to mobilize volunteers is to bring people together through public forums, bridging class, generational, and cultural lines to create a broadly supported agenda for civic action. Boomers should be involved in such discussions now, to foster a sense of ownership and begin to plant seeds among those who are exploring alternatives for their own futures. Engaging even a substantial minority of boomers in community-wide projects can have a significant cumulative social impact. Local colleges or universities might serve as conveners of these public forums. Interfaith organizations, business coalitions, or existing civic organizations are other possibilities—depending on the structures already in place in each community. By identifying specific, actionable projects that address community problems—such as creating safe and supportive environments for children, providing support to vulnerable elders, or creating safe and accessible common public spaces—the forums could help channel the energy and resources of retirees and generate community-wide momentum. Organizers of the forums should take into account potential obstacles to involvement through attention to such factors as scheduling, location, format, and childcare.

## Reach Out to Youth

Community-based initiatives that bridge the generations deserve special attention. Such programs build community by integrating the old with the young, transmitting knowledge and experience to future generations, and re-enforcing the value of people of all ages. Studies have found that young people in intergenerational programs show measurable improvements in school attendance,

attitudes toward school and the future, and attitudes toward elders. In addition, the adult volunteers report substantial benefits to themselves: the satisfaction of sharing their experience, feeling useful, and giving back to the community (Taylor and Dryfoos 1999).

## Organize Large-Scale Media Campaigns

A series of strategic media campaigns, at the national and local levels, might very well succeed in mobilizing boomer volunteers in large numbers. Previous campaigns on other issues have influenced social attitudes and norms as well as individual behavior. For example, the National Designated Driver Campaign, led by the Harvard School of Public Health, created a new social norm which a majority of the American public adopted (Winsten 1994). Similar initiatives, focused on boomers and civic engagement, could have a tremendous impact by:

- Stimulating an ongoing public dialogue to redefine the meaning and purpose of life after retirement.
- Encouraging the entertainment and advertising industries to rethink the images of aging projected through their work.
- Encouraging journalists to cover aging in new ways.
- Prompting national and local policymakers to deal effectively with infrastructure and funding issues.
- Recruiting large numbers of boomers to engage in the community.
- Creating a society that values the skills and experience of its older members.

**In sum, as boomers enter later life with many relatively healthy, productive years ahead, they have the potential to become a social resource of unprecedented proportions, and create a new vision of what it means to grow older in America. This possibility offers a way to reframe public discussion about the implications of the aging baby boom, shifting the focus away from the expectation of frail and dependent aging to one of activity and productivity. Three major conclusions from this Report will help realize this vision: (1) large-scale efforts will be needed to mobilize boomers to contribute their time, skills, and experience to address community problems at the local level; (2) many organizations that utilize volunteers will require substantial retooling if they are to attract and retain boomer volunteers; and (3) the news media, the advertising industry, and Hollywood can play key roles in helping society rethink the meaning, purpose, and status of the older years.**

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# Background Papers

A

# Enhancing Volunteerism among Aging Boomers

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# Executive Summary

**This paper discusses the demographic, psychographic/attitudinal, and behavioral factors that influence baby boomer volunteering. It also discusses what these factors may portend for the future. It begins by defining the baby boom and its demographic characteristics. These demographics are then compared to those of older persons and volunteers in order to assess the implications of these characteristics.**

It finds mixed demographic portents for future boomer volunteerism. A curvilinear relationship between age and volunteering suggests that boomers are leading current volunteer efforts. The expectation that boomers may work longer than their predecessors is a positive note, since there is little evidence suggesting that volunteering increases with retirement. The future health and affluence of the boomers cannot be predicted with certainty, but the healthier and more economically secure boomers are in their later years the more likely they will be to volunteer. The relative tendency of boomers to reside in nonmarried households could be a negative, especially as children of boomers mature and boomers assume caregiving responsibilities for aging parents. The increased racial and ethnic diversity of the boom also suggests that volunteerism may be more informal and take on different characteristics in the future.

The paper then looks at the behavioral aspects of volunteering and boomer attitudes toward retirement and volunteering. It discusses the future of boomer volunteerism and how participation in volunteering might be maintained or expanded.

It finds that most boomers approach retirement positively, with a sense of retirement as a time for relaxation and self-indulgence. They approach retirement in a context of independence and self-reliance. While a positive and active life orientation is a foundation for volunteering, the self-indulgence and independence of the boomer cohort provides an opposite orientation. Boomers expect to remain in their current communities, a plus considering the role of the community connection in volunteering. The paper further finds that boomers are less likely than older cohorts to volunteer out of a sense of duty, obligation, or religious commitment, although religious institutions remain a primary focus of volunteer activity.

Most boomers favorable to volunteering are already doing so. As a result, the paper recommends that efforts to further engage boomers would be most successful by focusing on maintaining the involvement of current boomer volunteers. Appeals likely to succeed would include those focusing on self-development, self-interest, and volunteering as a social, beneficial, enjoyable experience. Extending current involvement or using current organizations and activities as a bridge to others have the greatest potential for success.

The paper concludes by noting that the diversity of the baby boom generation qualifies these general statements. The findings suggest that the success of any efforts to engage boomers in volunteering as they age will be as diverse as the boomer cohort itself and the communities in which they reside.

## 1

# Population Trends

## Defining the Baby Boom

The aging of the baby boom cohort is a major driver of the more general aging of the U.S. population. According to U.S. Census data, in 1930 less than one-fifth of the population (17 percent) was age 50 and over, with 5 percent 65+ and less than 1 percent 85+. By 2000, those percentages had increased to 28 percent, 13 percent, and 2 percent, respectively. By 2020, according to Census projections, more than one-third (36 percent) of Americans will be age 50 and over, and almost one in five (17 percent) will be 65 or older.

The baby boom was the result of an increase in fertility rates following World War II. Individuals who had delayed family formation during the war or the Depression joined those who were forming families “on schedule,” substantially increasing the birth rate.

Demographers define the baby boom birth years as 1946 through 1964. High birth rates during those years resulted in 78 million baby boomers, now aged 39 to 57. This group comprises 28 percent of the U.S. population, or nearly 3 in 10 Americans. According to U.S. Census projections, by 2025 there will be 65 million boomers who will range in age from 61 to 79 and comprise one-fourth of the U.S. population.

The baby boom is both large in numbers and covers a wide age range. While the oldest boomer will turn 65 in 2011, the youngest boomer will not reach that age until 2029. The Census-projected life expectancy of a person aged 45 in 2002 was 79: 78 for males and 81 for females. This suggests an extended life span beyond the traditional ages of retirement.

## Characteristics of the Baby Boom

**Education:** Boomers have higher levels of formal education than does the pre-boom cohort. According to the 2002 Current Population Survey (CPS) of the U.S. Census, one in three boomers

has at least an undergraduate college degree, compared to one in five persons in the pre-boom cohort. When those who have at least some college experience are considered, 58 percent of the boomers fit this description, compared to 40 percent of those who are older.

**Race/Ethnicity:** The boomers are also more racially and ethnically diverse than their elders. According to the 2002 CPS, more than four out of five persons older than the boomers are white non-Hispanic, compared to three out of four (74 percent) boomers. The boomers are particularly more likely than their elders to be Hispanic (10 percent vs. 6 percent) or African American–non-Hispanic (11 percent vs. 9 percent).

**Income:** “First Wave” boomers, ages 48–57, are in their peak earning years and have a median household income of \$63,426, according to the 2002 CPS. This compares to \$61,211 for younger boomers, \$48,000 for those aged 58–64, and \$27,512 for those 65+. These median figures mask a considerable range. One in four boomer households have less than \$35,000 a year in income, and about 10 percent are in poverty. On the other hand, one-fourth of the boomers have annual household incomes greater than \$95,000.

While the average income of boomers appears substantial, projecting boomer income in retirement is more problematic. A recent report from the General Accounting Office (2003) found that while boomers have accumulated more wealth than did their elders at the same point in their life stage, they also carry higher debt loads. Unresolved issues surrounding Social Security solvency cloud the future as well. Shifts toward defined contribution pension plans from defined benefit plans also make the future less certain. An AARP study (1994) using econometric modeling to forecast the economic status of boomers in retirement found that their retirement income will be widely varied, depending on the number of retirement income sources and how successful some of those sources are in providing income.

**Health Status:** Health status tends to decline with age, but the boomers do practice some lifestyle traits that portend a marginally better future. Boomers are marginally more likely to exercise than their elders (Yankelovich 2000). While 37 percent of those older than the boomers report no exercise activities, this is true of only 31 percent of the boomers. Exercises more prevalent among boomers than their elders include using exercise equipment (19 percent vs. 13 percent), jogging or running (11 percent vs. 4 percent), and aerobic dance (11 percent vs. 6 percent). Boomers are also far less likely to smoke than those at the same age in previous decades, according to data from the Centers for Disease Control and Prevention of the National Center for Health Statistics (1998).

More than half of men and about 40 percent of women of boomer age in 1965 were smokers, compared to about one-third of boomer men and one-fourth of boomer women today.

On the other hand, these data also show that boomers are more likely to be overweight or obese than previous generations at the same age. More than one-third of boomer men and 4 in 10 boomer women are overweight, compared to about one-fourth of men and more than one-fourth of women of boomer age in the 1960s.

Disability tends to become more prevalent in middle age, so its impact on the boomers is yet to be determined. National Center for Health Statistics data (2003) show that while 13 percent of those 25–44 report some level of disability, that percentage rises to more than one in three (36 percent) among those 55–64, and more than half (55 percent) of those 65+.

In general, however, a long-term trend towards greater health for the older population is evident. In the early 1980s more than one-quarter of those 65+ had some level of chronic disability, a proportion that has dropped to less than 20 percent today. Overall, from 1982 through 1999, the prevalence of disability among older Americans declined from 26.2 percent to 19.7 percent. Death rates for heart disease, the biggest health threat to older persons, have dropped 30 percent since 1980, although death rates from cancer, the second biggest death threat, have increased by about 8 percentage points, as reported by the National Vital Statistics System and compiled by the Centers for Disease Control and Prevention (U.S. Department of Health and Human Services 2003).

Nonetheless, aging is beginning to impact the baby boom generation. While a 1998 AARP survey of boomers regarding their planning for and expectations of retirement found that 27 percent reported their health as “excellent,” in a 2001 follow-up survey three years later that percentage had dropped to 21 percent. Similarly, the percent describing their health as “fair” or “poor” rose from 22 percent to 30 percent, or fully one in five. In 2001, 28 percent reported surviving a major illness, compared to 21 percent reporting this three years earlier.

**Internet Use:** Almost half (45 percent) of boomers “regularly” use the Internet, according to the 2000 CPS, compared to 20 percent of those 57+.

**Employment Status:** Boomers have yet to reach traditional retirement ages, and an AARP lifestyle survey (2002a) focusing on the current status of this generation found that less than 5 percent of this cohort have actually retired. Boomer attitudes towards their future of work suggest a higher level of labor force participation than the pre-boom cohort. A Del Webb survey (2002) of the small

population of retired boomers found that half wanted to return to work. A recent AARP survey (2003b) of workers 45+, many of whom are boomers, found that more than 10 percent of older workers had previously retired from another job and rejoined the work force. However, the EBRI/AARP annual Retirement Confidence Survey (2003) found that about half of current retirees retired earlier than planned, typically due to health concerns or an adverse economic event related to their employment (downsizing, layoffs, closings, etc.).

In 1998 AARP and Roper-ASW interviewed a large sample (n = 2,000) of boomers regarding their anticipation of and planning for retirement. In that survey and in a 2001 follow-up study conducted with ICR Research, four out of five boomers saw work as playing a role in their retirement years, with only 20 percent anticipating retiring and not working at all. The most recent EBRI/AARP annual Retirement Confidence Survey of 1,000 workers age 25 and over found that nearly half of all workers expect to retire at 65 or later, compared to 41 percent who felt that way in 1991. AARP's Staying Ahead of the Curve survey (2003b) of workers 45+ found that 69 percent plan to work in some capacity during retirement, with only 28 percent expecting to not work at all.

Employer needs may also create a “demand-pull” effect that increases the activity of the older work force. Labor force growth peaked in the 1970s with a 2.6 percent annual growth rate. It is expected to average less than 1 percent from 2000–2010. According to the Bureau of Labor Statistics and Census projections cited in the February 2002 issue of *American Demographics*, the part of the labor force consisting of individuals ages 25–54 will only grow by 3 percent from 2000–2020, compared to 35 percent from 1980–2000. The 65+ work force will increase by 30 percent, and the 55–64 work force by 52 percent. A 2002 article from *Business Week* concludes that employers may have to “entice older workers to retire later or return to work, and alter laws governing pensions to discourage early retirement.”

The trend towards early retirement has flattened out, if not actually reversed. Historical data from the Bureau of Labor Statistics indicates that while 89 percent of men ages 55–61 were employed in 1965, that percentage dropped each year until 1994, when it reached 74 percent. It now stands at 75 percent. Similarly, for men ages 62–64, the percent employed was 73 in 1965, dropping to 45 in 1994. It has now risen to 48 percent. For those aged 65–69, the bottom of the early retirement trend came earlier. While 43 percent of this age group were employed in 1965, and 24 percent were employed in 1985, that percentage rose again to 31 percent in 2001.

For women the changes have been more linear, given the changing gender composition of the workplace. For women 55–61, 45 percent were employed in 1965, while 59 percent are currently



employed. For those 62–64 the percentages are 30 percent and 37 percent, respectively, while for those 65–69 they are 17 percent and 20 percent.

Another factor influencing the decision to remain active in the work force is the centrality of work to boomer and older worker self-esteem. The AARP Staying Ahead of the Curve survey (2003b) found that four out of five workers 45+ feel that work is important to their self-esteem, and this perception is further correlated with income (higher) and race/ethnicity (white non-Hispanic). Among this group, the desire to remain in the labor force is relatively strong compared to the working older population as a whole.

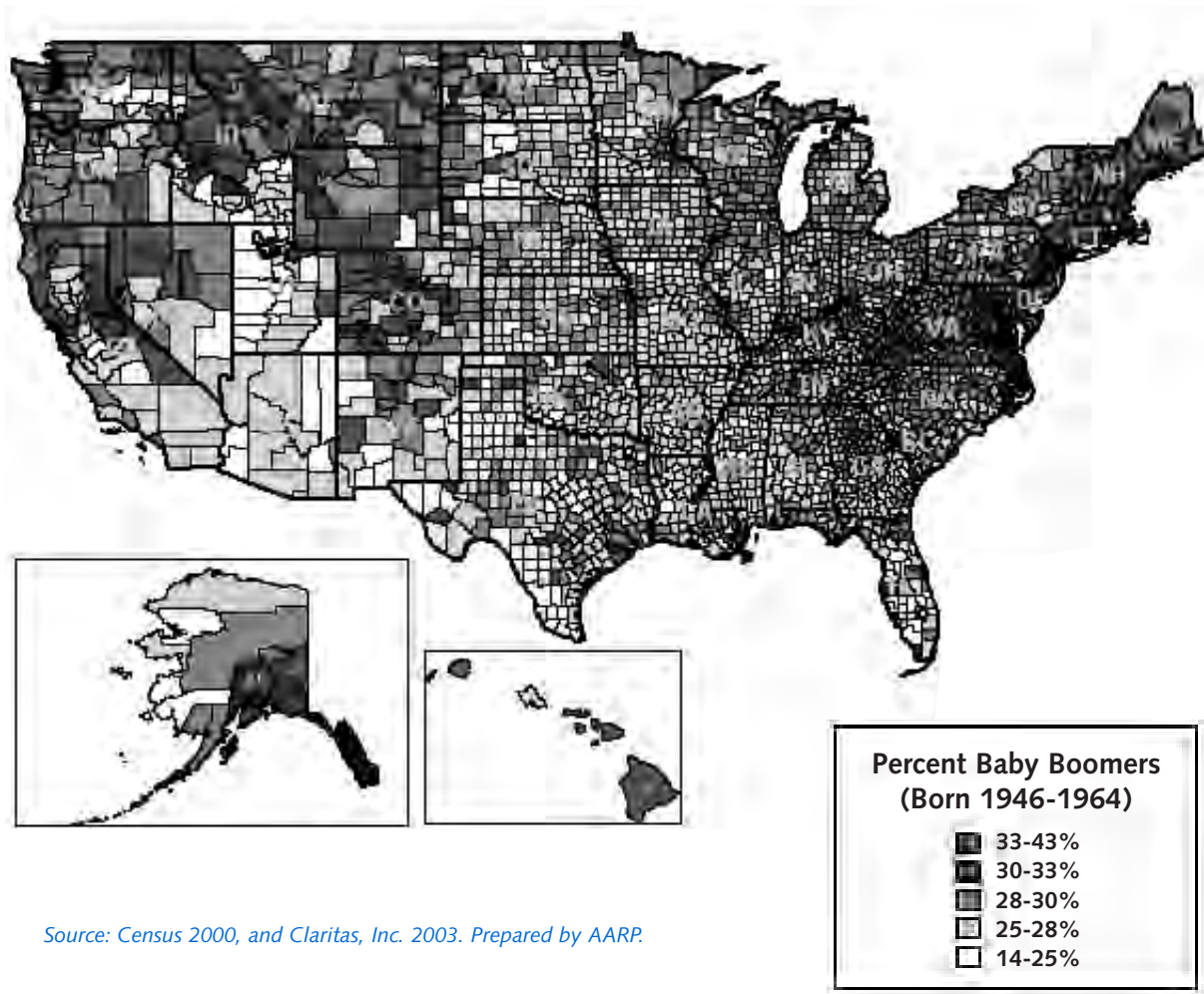
**Marital and Family Status:** Most boomers (70 percent) are married, but they are more likely than those older than themselves to be divorced/separated (17 percent vs. 11 percent) or never married (12 percent vs. 5 percent). Conversely, the baby boom is less likely to be widowed (2 percent vs. 23 percent). (U.S. Census 2002) Given the tendency toward greater widowhood with age, coupled with the higher proportions of unmarried boomers, fewer older boomers will be residing in married households in their older years compared to the current generation of older persons.

Half of all boomers, and almost two-thirds of younger boomers, have children under 18 living in their household, according to the 2001 CPS. Data from the AARP boomer retirement surveys of 1998 and 2001 indicate a major transition currently underway in this regard. In the 1998 survey, 19 percent of boomers reported that their last child had moved out of the house; three years later that figure rose to 27 percent. Caregiving responsibilities are also becoming more of a factor for aging boomers. In AARP's 1998 boomer retirement survey, 26 percent of boomers reported caring for an older parent, compared to 34 percent in the follow-up survey in 2001.

**Geographical Considerations:** Boomers are not distributed uniformly across the nation, but tend to vary by locality (Figure A-1). They tend to be concentrated in metropolitan areas, as opposed to rural counties. Regionally, they are more highly concentrated in New England, the Mid-Atlantic states, the upper Great Lakes states, and the Pacific Northwest, as opposed to the non-urban South, the Midwest, and the Southwest. This is unlikely to change dramatically, given that only about 1 in 10 boomers express a strong preference for moving from their current area of residence to another, a percentage that has been stable over the past three years.

Putnam (1996) also found little evidence that this geographic distribution of boomers will change significantly, since "rates of residential mobility have remained remarkably constant over the last half century" and that, if anything, they have declined over time.

**Figure A-1: Map of Percent of Population Baby Boomers by County  
(Continental U.S., Alaska, and Hawaii)**



Source: Census 2000, and Claritas, Inc. 2003. Prepared by AARP.

**A Summary of Boomer Demographics:** The baby boom cohort is noteworthy, not just for its size and the number of years it spans. It is a relatively well-educated, ethnically diverse group. While it is relatively affluent in general, it is economically diverse, and the degree of economic security it will enjoy in later years is yet to be determined. It is a generation in transition as it copes with the milestones of aging, specifically health status and changes in family structure. Boomers are a cohort that will likely be more active in the labor force for a longer period than the cohort that preceded it. They will be relatively stable geographically, but their presence varies by geography as well. Finally, they will be more connected to the Internet in their later years than their predecessor cohort. Each of these demographic characteristics has implications for the future with regard to the extent and nature of volunteering and community service practiced by boomers.

## 2

## Volunteer Trends

### The Prevalence of Volunteering

Substantial proportions of Americans volunteer, but the specific incidence of volunteering is difficult to determine. Various definitions of volunteering exist, and data on volunteering is primarily if not exclusively drawn from survey research. In these survey results, incidence levels can vary depending on definition, question wording, data collection methodology, sampling procedures, and so on, as well as the expected sampling error.

Reported recent incidence of volunteering has ranged from the 34 percent of adults in the 2002 United Way national survey who said that they had “volunteered for any type of service in the past 12 months,” which was further defined as “helping others without monetary pay, not just belonging to an organization,” to the 59 percent who said they have volunteered or done community service work in the past year, according to a survey conducted by Peter D. Hart Research Associates for Civic Ventures (1999).

In an AARP survey (1997) focusing on volunteering and other aspects of civic engagement and involvement, 44 percent of Americans said they volunteered at least some of their time for a “charitable, civic or helping organization” in the last 12 months. A majority (56 percent) of Americans said they were volunteering for a “community, church, civic, or any other type of organization” in a United Parcel Service (UPS) survey (1998). A 2001 Independent Sector survey using similar language found a 44 percent incidence rate for community volunteering.

AARP’s Staying Ahead of the Curve survey (2003b) found that 48 percent of working adults 45+ say they volunteer, and a series of AARP surveys conducted at the state level found that about 40 percent of AARP members (50+) volunteer.

The Social Capital Benchmark Survey of the John F. Kennedy School of Government at Harvard University (2000) found that a little over 50 percent of adults had volunteered at least once during the previous year.

An AARP survey of intergenerational volunteering (Harootyan and Vorek 1994) found a volunteer incidence of 54 percent.

A Pew Foundation survey (2001) found that 77 percent of the public had “helped out a neighbor with a problem,” an atypically broad definition of volunteering that includes informal as well as formal, structured assistance. When the survey applied a more formal definition, the incidence was more consistent with other data, with the Pew research finding that “about half (54 percent) say they have done some volunteer work for a charity, religious organization, local school, neighborhood watch, or other community group during the past year.”

The Prudential Spirit of Community Adult Survey (1995) found that 58 percent are “currently giving some time to a volunteer activity.”

Trend data on volunteering is less clear, especially in recent years. The Independent Sector’s 2001 survey of giving and volunteering found a 44 percent incidence for volunteering, although the survey report indicated that this was a drop from the 56 percent reported in the Independent Sector’s 1999 survey. The survey methodology had been changed substantially, however, limiting the ability to draw conclusions regarding trends. Since the survey was first fielded in the mid-1980s, reported volunteer incidence has fluctuated between 44 percent and 56 percent.

On the other hand, the UPS survey (1998) found that among those who were not currently volunteering, 20 percent had volunteered previously. The Independent Sector (2001) also found that compared to five years previously, 20 percent say they are volunteering more and 33 percent say they are volunteering less, with 23 percent maintaining the same level of involvement as previously.

The most recent AARP survey data on this topic with ethnic minority oversamples (2003a) found that 51 percent of adults 45+ formally volunteer, with informal volunteering raising the incidence to 62 percent.

## The Extent of Volunteering among Those Who Participate

While substantial percentages of individuals are involved in volunteering and community service, the extent of this involvement is limited. Personal preferences and other priorities and responsibilities limit the potential expansion of this time commitment.

The AARP survey of civic participation (1997) found that the typical amount of time spent volunteering was one to five hours a month, mentioned by 32 percent of the total sample and more than half (57 percent) of the volunteers. In the UPS survey, 40 percent volunteered about 10 hours per month, with only 7 percent giving more than 40 hours a month. This averaged to about 3.5 hours per week.

The level of commitment to volunteering appears to be changing over time. The Independent Sector survey (2001) also found that while incidence of volunteering has been increasing, the average number of hours volunteered has declined from 4.7 in 1987 to 3.5 in 1999 and 3.6 in 2000.

The Prudential Spirit of Community Adult Survey (1995) also measured extent of involvement and found that 12 percent of volunteers said they were “highly involved,” 29 percent “moderately involved,” and the majority (59 percent) less actively involved. Those at least moderately involved spent about 2 hours a week on volunteer activities, while the highly involved group averaged about 10 hours a week. The remaining 59 percent averaged about one half-hour per week.

Of the volunteers surveyed in the AARP state volunteerism surveys (2003c), 33 percent volunteered “occasionally through the year for special projects,” while 19 percent spent about the same amount of time each month, and 28 percent did both.

The Independent Sector survey (2001) found that the most common type of volunteering (41 percent) was time contributed sporadically or through a one-time activity. Chambre (1990) reported that most older adults spend five hours per month or less on their volunteer activities.

The AARP state volunteer surveys (2003c) further found that half of volunteers ages 50–59, a cohort made up now primarily of older boomers, volunteer mostly for episodic special projects (47 percent). Only about one-fourth (23 percent) are steady volunteers who donate about the same amount of time each month, with about another fifth (22 percent) volunteering in both contexts. While the percentage of those volunteering the same amount or the same amount plus additional episodic volunteering increases with age, the overall incidence of volunteering declines.

Himes (2001) found that less than 30 percent of persons 65+ volunteer, and most of these do so for less than two hours a week.

The Independent Sector research (2001) found that at least half of the volunteer population is marginally involved, participating in only short events or in conjunction with specific holidays.

A study by the National Volunteer and Philanthropy Centre, Singapore (2002) suggested that the trend toward short-term volunteer commitments is global. More than 70 percent of active volunteers polled said they prefer assignments that last less than six months. The study refers to a group of “just in time” volunteers, who prefer offering help on short notice and working on ad hoc projects rather than engaging in longer term assignments.

**A Summary of Volunteering:** Overall, it appears that approximately half of American adults are either currently involved in some type of volunteer service or have been so involved recently. This incidence has been relatively stable over recent years. Much of this volunteering is “episodic,” characterized by limited participation in terms of number of hours or periods of time over the course of a year.

## The Demographics of Volunteering

Age: Volunteering tends to peak in mid-life and then decline slightly, declining further among the oldest old, typically those over the age of 75. This tendency has been relatively stable in research conducted in recent years despite the aging of the population and other social dynamics.

Analysis of the 1995 and more recently the 2001 Independent Sector survey data as well as the AARP intergenerational volunteering survey (Harootyan and Vorek 1994) finds that volunteering incidence increases with age and then decreases for individuals 65+. Volunteer activity tends to peak at middle age and decline with further age, especially among the “oldest old,” or those 75+.

Chambre (1990) found that participation by older persons had increased substantially over the years. From an 11 percent participation rate noted in 1965, the percentage of 65+ individuals engaged in volunteer activity increased to 37 percent by 1987 and has continued to increase to its current level of approximately 45 percent, depending on question wording. The slowing of the growth in older volunteerism, however, suggests that we may be nearing the upper limits of potential older volunteers.

Moreover, she found that “[p]eople 65 and over spent about six hours a week in volunteer work, not much more than people in mid-life,” despite the relative lack of time constraints necessitated by work, child care, and so on. In addition, she concluded by saying, “Older volunteers are essentially volunteers who have grown older.” In other words, older volunteers tend to have volunteered throughout their life, rather than to begin volunteering as they age.

The AARP civic involvement survey (1997) found boomers to be the most likely age cohort to volunteer, reporting a 60 percent incidence of volunteering, compared to 47 percent for those 51–70 and 36 percent for those 71 and older.

The Harvard Social Capital Benchmark Survey (2000) also noted a curvilinear relationship with regard to age and volunteering, with mid-life individuals currently represented by the boomer cohort being the most active, followed by older persons, then by individuals younger than the boomer cohort.

Burr, Caro, and Moorhead (2002) noted a curvilinear relationship not only between age and volunteering but also between age and various civic participation activities, such as volunteering for political purposes, voting, attending meetings, and so on. They found this involvement peaks at ages 45–54, which is represented by the boomer cohort.

**Health Status:** One of the biggest factors in the decline of volunteerism among older persons is declining personal health. The AARP state volunteer surveys (2003c) found that specific reasons for not volunteering were often related to age. The 50–59 group was most likely to say that “work commitments” were the biggest obstacle, with “personal schedule too full” a close second. Among those 60–74, “personal schedule too full” was the key factor, despite reduced work hours, with “work commitments” substantially lower. Among those 75+, however, health and disability issues became the primary issue.

Kincade (1996) found that age, gender, and perceived health status were the strongest predictors of providing help to older persons needing personal care.

A study of predictors of volunteer status among retirees (Cox and Parsons 1993) found that frequent church attendance, health status, previous volunteering, and membership in several clubs or organizations were the key significant predictors of active volunteering.

Brown (1999) also found that “health status has a powerful effect on volunteering—especially among older persons.”

Van Willigen (2000) found that health status is a strong correlate of volunteering, particularly among individuals aged 60+.

Gallagher (1995) found that age is also related, albeit indirectly, to the nature of volunteering, stating that “the large majority (95%) of the elderly (60+) are involved in giving care to family, friends and others.” She found that older persons help fewer individuals but for greater amounts of time. She also found that “when the effects of health, income and availability of primary kin are controlled, older men and women do not differ significantly from their younger counterparts in terms of the number of kin helped or the time spent helping them.”

Internal AARP research (2002c) on its volunteer cadres found that the primary reasons to stop volunteering are health-related issues impacting either the volunteer directly or indirectly through increased caregiving responsibilities.

**Income:** The Independent Sector research (2001), the AARP civic involvement survey (1997), and the AARP intergenerational volunteering survey (Harootyan and Vorek 1994) all found a positive relationship between income and volunteering. The Independent Sector further noted the indirect effects of income on volunteering, in that individuals who are more worried about their economic situation tend to be less likely to either volunteer or make charitable contributions.

Gallagher (1994) also found a relationship between income and help of both kin and non-kin in the community. Anheirer and Salamon (1999) found the role of income, in the context of social class, to be a consistent factor across the cultures of many different countries with regard to likelihood of volunteering.

**Education:** Higher levels of education are also related to higher levels of volunteering, as reported in both the various AARP and Independent Sector surveys.

**Gender:** A consistent finding of all research in this area is that women are more likely to volunteer than men and, when they volunteer, women are likely to volunteer more often and to a greater extent than do men.

**Race/Ethnicity:** The relationship of race and ethnicity to volunteering is more complex than that of some other factors. The Independent Sector research noted a relationship at the descriptive level. However, where other related variables like income and education are controlled, such as in the AARP civic involvement survey (1997), this relationship tends to be overshadowed by these other more powerful factors.



Observational findings indicate that while individuals from racial and ethnic minority backgrounds are less likely to formally volunteer, they are more likely to spend more time engaged in this activity when they become involved. Further, the Independent Sector, in its discussion of the “Power of the Ask,” noted that when racial/ethnic minorities are approached interpersonally and asked to volunteer, they tend to volunteer at about the same rate as white non-Hispanics. However, they report less of this type of personal appeal to volunteer than do whites. Gallagher (1994) noted and cited other research that observes that African Americans are more likely to provide the type of help normally associated with volunteering through extended informal helping networks that are neighborhood- and family-based but outside any formal helping organizations.

On the other hand, the AARP intergenerational volunteer survey (Harootyan and Vorek 1994) did note a higher incidence of volunteering among white non-Hispanics, but a greater intensity of involvement among African Americans. An AARP survey of multicultural informal caregivers (2002c) found that racial and ethnic minority populations are more likely to engage in intergenerational caregiving. This informal family support is in contrast to higher levels of formal volunteering among non-Hispanic whites.

A very recent (2003a) AARP survey of volunteering among individuals 45+ with ethnic oversamples found that informal volunteering tended to be most prevalent among African Americans (41 percent) and least prevalent among Asian Americans (25 percent). Formal volunteering was most prevalent among non-Hispanic whites (52 percent) and Asian Americans (53 percent) and least prevalent among Hispanics (43 percent). As a result, overall volunteering, both informal and formal, ranged from 65 percent among both non-Hispanic whites and African Americans (although with a different formal/informal mix) to 55 percent among Hispanics.

**Employment Status:** Conventional wisdom holds that volunteering increases when individuals retire, given the significant increase in free time. The actual relationship runs in the opposite direction, with employment more likely to be related to volunteering than is being out of the work force.

This finding is partially derived indirectly, since, as was noted previously, volunteer incidence gradually declines after peaking in mid-life. Most individuals retire in their early 60s, somewhere between 62 and 65. If retirement and volunteering were linked, a large increase in frequency of volunteering would be noted in this age group. This increase is lacking in any of the major survey data sets related to volunteering.

While conventional wisdom holds that a society with expanded leisure time will be one predisposed to additional community service and involvement, some data provide contrary evidence. A 2002 analysis of Roper Reports omnibus tracking survey data focusing on women (who are predisposed toward volunteering to begin with) and leisure time found many women to be primarily family focused. When asked what they would look for in a leisure-time activity, most (63 percent) focused on time with family, followed by relaxation (52 percent) and time for self (47 percent). “Helping others” was cited by 32 percent, and by 34 percent of those 50+. This ranked last overall among seven different options for the total population. It was ranked next to last by those 50+.

Putnam (1996) pointed out that longitudinal data reveal no ties between work and various aspects of civic engagement. He noted that employed individuals tend to watch TV less and spend less time eating, sleeping, reading, doing nothing, or being involved with hobbies. This contributes to higher levels of stress, but these are all activities that expand when work is reduced, as opposed to civic activities such as volunteering. He added that, around retirement, TV viewing increases but group membership and social trust decline, which contribute to discourage the volunteering that the increase in free time potentially makes available. The role of television should not be underestimated, given the research of George Gerbner (1976) and others at the Annenberg School of Communication at the University of Pennsylvania that demonstrated a link between increased TV viewing and decreased social trust.

Anheirer and Salamon (1999) have pointed out the importance of social networks in providing a foundation for volunteering, and these may be reduced when direct and indirect workplace networks are eliminated as a result of retirement.

Brown (1999) concluded that “being busy exposes older adults to opportunities to volunteer and this proves to be more important than the higher opportunity cost of time in determining who volunteers.”

Bradley (2000), in addition to finding both religious affiliation and socioeconomic status to be important drivers of volunteering, cited a previous Commonwealth Productive Aging Study finding that retirement is not associated with higher rates of volunteering, and that this life event change does not lead to changes in overall behavior patterns in this regard.

Gauthier and Smeeding (2000), examining various efforts that used a diary method to collect data tracking time use, concluded, “There does not appear to be a substitution between paid and unpaid work. At older ages, people do not devote more time to unpaid or volunteer work—irregular,

passive leisure is the only thing to show a real increase," a finding that is consistent across different countries.

Robinson and Godbey (1997), researchers who pioneered the use of diary methods to study time use in the United States, found that time spent volunteering has been relatively stable since 1965. While time spent on active sports and TV viewing are up, time spent on housework and work for pay are down over this time period. They also documented the rise in passive leisure that occurs at retirement and the lack of change in other more active pursuits like volunteering and community service.

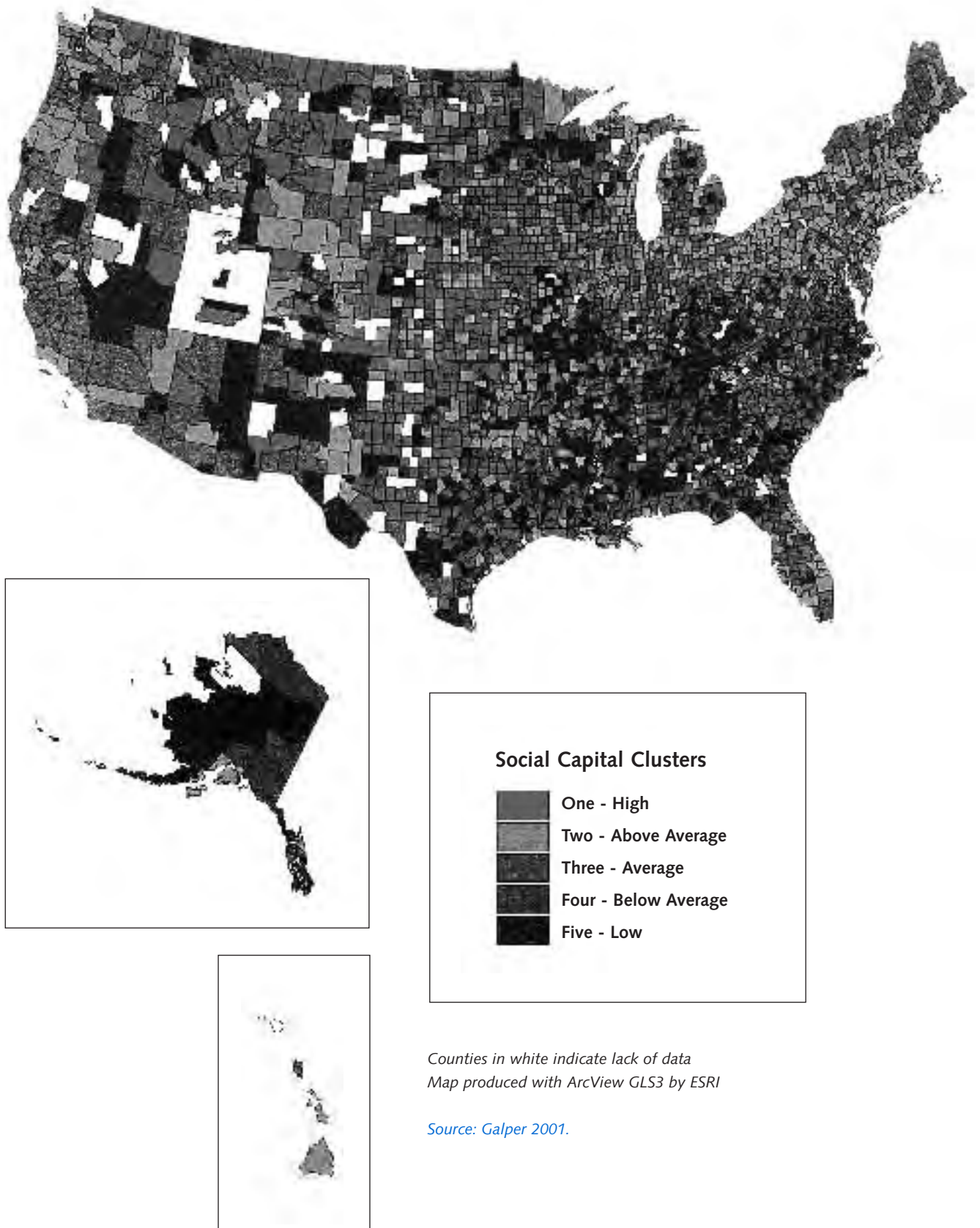
Rosenkoetter, Garris, and Enghda (2001) found that retirement typically brings with it an increase in sedentary activities, hobbies, and religious activities, but no change in physical exercise or social activities.

**Geography:** The environment for community service varies substantially by community and also within communities. The Social Capital Community Benchmark Survey (2001), which examined both the nation as a whole and several specific community areas, found large differences in community support for civic involvement and community service.

The importance of geography was also noted by Galper (2001). He found that propensity to volunteer was related to several community-specific factors. This facilitated the clustering of counties into five different volunteer-friendly segments. These "social capital clusters" ranged from very high (6 percent of all counties) to very low (4 percent of all counties), with the bulk of counties falling in the somewhat high (36 percent) or somewhat low (19 percent) range. Besides a variety of demographic, economic, and cultural factors, the percent of population age 45+ was a key factor in driving higher levels of social capital and propensity for volunteering in the county-level analysis (Figure A-2).

The United Way (2002), through the use of an indicator of voluntarism and civic engagement, part of its State of Caring Index, last updated in 2001, found not only that scores on this indicator have declined during the 1990s but also that they vary considerably at the state level. At the county level, the Chronicle of Philanthropy (2003) found considerable variation in the degree to which individuals make charitable contributions as a proportion of their income, a behavior typically found to be highly correlated with volunteering.

Figure A-2: Map of Social Capital Clusters by County  
(Continental U.S., Alaska, and Hawaii)



**Computer Use:** The AARP civic involvement survey (1997) found that computer use was a significant driver of volunteering when other factors were controlled.

**Marital and Family Status:** Family status is an important correlate of community engagement, given the fact that community connections are often established and maintained through children. The Prudential Spirit of Community Adult Survey (1995) found that people who have children living at home are more likely to be volunteers (74 percent) than are people who have no children (49 percent). The AARP intergenerational volunteering survey (Harootyan and Vorek 1994) also noted the tendency for married individuals, individuals with children in the household, and households made up of larger families to volunteer more, and the AARP civic involvement survey (1997) found that households with children were more likely to volunteer than those without.

## Summary and Implications

Demographic portents for boomer volunteerism in later life are mixed. The curvilinear relationship between age and volunteering suggests that boomers are leading the current volunteer efforts. The size and age of this cohort suggests that we may be at the “high-water mark” of this type of civic engagement, absent some intervention that would keep boomer volunteers engaged at their current level and extent of involvement.

The expectation that boomers may remain engaged in the work force longer than their predecessors is actually a positive note with regard to volunteering. There is little evidence to suggest that volunteering increases with retirement and some evidence to suggest that work is one of the vehicles of social engagement that serves as a precondition for volunteering.

The future health and affluence of the boomers, two other drivers of volunteering, cannot be predicted with certainty, but the healthier and more economically secure boomers are in their later years the more likely they will be to volunteer. Boomers’ higher levels of education will be a positive factor, as will their higher computer and Internet use. The relative tendency of boomers to reside in nonmarried households could be a negative factor, however, especially as the children of boomers mature and establish independent households. The increased racial and ethnic diversity of the boom suggests that volunteerism may be more informal and take on different characteristics than the traditional manner in which volunteering has been defined and practiced. In any case, generalizations must be qualified given the local variability in both incidence of boomers and favorable preconditions for community-level civic engagement.

## 3

## Attitudinal Trends

### Psychographics/Attitudes of Boomers Regarding Retirement and Volunteering

The AARP boomer retirement survey (1998) found that 27 percent of boomers “strongly agree” that they will “devote more time to volunteering” upon retirement. These boomers are typically more optimistic about retirement, more healthy and active, more affluent, and more likely to be female, consistent with the behavioral/demographic patterns associated with volunteering. The same boomers who expect to devote more time to volunteering also tend to expect to devote more time to their family, their hobbies, travel and leisure, socializing, and exercise.

In the same survey, two out of three boomers were optimistic about their retirement. In a follow-up three years later, while more boomers (49 percent, a gain of ten points over 1998) had thought “very seriously” about retirement, the same proportion (two out of three) retained this positive outlook. The survey also revealed a potential limiting factor, in that while two out of three boomers were at least somewhat satisfied with the amount of money they were saving for retirement in 1998, this percentage had dropped four points by 2001, consistent with the less favorable economic conditions of that time.

Defining retirement as a period of leisure time also provides additional insight via survey data. A 2000 Roper Reports survey found that a family focus was the most important component of leisure time. More than two out of three boomers (68 percent) felt that time with family was a “very important” part of leisure, compared to 62 percent of those older than boomers. Time to oneself ranked fourth in importance as a component of leisure time among boomers, at 47 percent, compared to 40 percent for those older. Conversely, more older persons valued the time for enhanced spiritual involvement (50 percent), compared to 39 percent for boomers. Boomers tended to define leisure in terms of relaxation more frequently than did the older cohort (61 percent vs. 57 percent). The same relationship held true for outdoor activities (41 percent vs. 32 percent), amusement

(35 percent vs. 18 percent), and creativity (34 percent vs. 24 percent). “Helping others” ranked ninth out of ten among boomers, at 34 percent, compared to fifth out of ten for older persons, at a comparable 32 percent.

A 1998 Roper Reports survey found that 28 percent of boomers defined getting older as a “time to help others.” This percentage was stable and, if anything, had declined slightly (1 percent) compared to results of a similar survey in 1994. Conversely, 47 percent said that “more time to enjoy one’s self” was the key definition. The same survey found that relatively few boomers viewed their future negatively, with only 14 percent looking at aging as meaning “nothing to do.”

Roper-ASW, who collaborated with AARP on the 1998 Baby Boomers Envision Their Retirement survey, noted that while the boomer cohort is “quite heterogeneous,” its “self-reliance, independence and indulgence are lifelong traits,” and that “a hallmark trait of the baby boom generation is self-reliance.”

In the survey, almost half of boomers (46 percent) agreed that retirement would be a time of “fewer obligations,” and 55 percent felt that it would be a “time to indulge yourself.” Two out of three (68 percent) viewed it as a time of leisure, and even more viewed it as a “time to pursue your interests and hobbies” (74 percent), with 54 percent looking forward to “socializing” and 61 percent anticipating the “traveling you couldn’t do when you were younger.”

The same survey found that some of the tendency towards self-reliance is evidenced in such responses as that 61 percent “completely disagree” that “people ought to be able to depend on their family financially during retirement,” with only 10 percent agreeing to any extent. Similarly, 59 percent disagree (43 percent strongly) with the notion that they will have to provide financially for their children, and 69 percent agree (61 percent strongly) that they do not want to depend on their children during retirement. Two out of three disagree (64 percent, with 48 percent strongly) that they will have to provide financially for their elderly parents or in-laws, and only 4 percent expect their children to help them out financially.

The boomers feel that their generation will need more money to live comfortably in retirement than did their parents (84 percent agree, 63 percent strongly), that they are more self-indulgent than their parents (75 percent agree, 52 percent strongly), and that they are more self-reliant than the generation that preceded them into retirement (41 percent agree, 21 percent strongly, with only 27 percent disagreeing to any extent).

While these trends are noted at the aggregate level, in actuality boomers differ widely in their approach to and expectations of retirement. The study uncovered five distinct segments of boomers regarding retirement, three with a positive outlook (68 percent of the total) and two with a negative outlook (32 percent).

These segments consist of:

**1) The Strugglers (9 percent)** This group has few financial resources and is very pessimistic about its future. This segment is primarily female, not married, with low education and income levels, and is less likely to be employed. They are more likely to have suffered an adverse life event such as divorce, job loss or major illness. They are less likely to describe their health as good or excellent. They have virtually no money saved for retirement and expect to have to work to make ends meet or to rely on Social Security for retirement income.

**2) The Anxious (23 percent)** This segment is better off financially than the strugglers in that they have some retirement resources and a more stable employment situation, but they are relatively concerned with health care issues. They have demographic characteristics that are similar to the strugglers in direction but are not as strongly varied from boomers in general as the strugglers are. That is, they are slightly more likely to be female, not employed full time, and to have slightly lower income and education levels. Their self-reported health status is also somewhat lower than boomers in general. While neither this group nor the strugglers are optimistic about retirement, what tends to set this segment apart is its concern over health care. This segment is more likely to feel that they will not have adequate health care coverage in retirement, which will prevent them from getting the care they need when they need it. They are less confident in Medicare than other segments. They have some retirement savings but not enough to instill confidence in their economic future. They are less likely to see retirement as a time for increased travel, recreation, or community service, but more likely to see it as a time of economic hardship.

**3) The Enthusiasts (13 percent)** This primarily upscale segment has significant retirement savings. They are optimistic about retirement and are anticipating it as a time to be free of work and other responsibilities and to enjoy hobbies, travel, relaxation, and self-improvement. They do not plan to work in retirement and feel that they have been successful in providing for a retirement income that is more than sufficient. They are more likely to be male and married, but education and income levels are similar to boomers as a whole. They are less likely to have experienced divorce and tend to report higher levels of health. They are confident about their health care as well as their income.



Although their demographic background suggests that they might be positively predisposed to volunteering, they are less likely to anticipate this as a retirement lifestyle than are boomers in general.

**4) The Self-Reliants (30 percent)** This segment is also economically upscale, with a higher likelihood of having significant retirement savings. They differ from other segments, particularly the enthusiasts, in their anticipation of being more connected to the community through activities like continued employment and community service. This is the only segment with a higher than average anticipation of doing more volunteering in their retirement years. They are more likely to be married, well-educated, and higher-income, with higher levels of self-reported health status. Although they have thought more about retirement and are more likely to agree that they “expect to have plenty of money when retired,” they still plan to work, particularly part-time for interest or enjoyment if not for financial reasons.

**5) Today's Traditionalists (25 percent)** Middle-income with moderate retirement resources, they are also characterized by their support for aging entitlements and their tendency to expect more intergenerational family support. This group comes closest to matching the overall boomer demographic profile in terms of education, income, employment, health status, and gender. They are the most ethnically diverse, however, being the only segment with a disproportionate incidence of African American and Hispanic boomers. They are much more confident in and have a favorable view of Social Security and Medicare than do boomers in general. They are also more confident than average in their anticipation of having adequate health coverage and access in the future. While they maintain this confidence in entitlements, they also tend to expect to work in their retirement years for a variety of reasons.

In addition, workers 45+ responded that if suddenly freed of work obligations, for instance with a major lottery win, only about a third (32 percent) would expect to do more volunteering, as reported by the AARP Staying Ahead of the Curve survey (2003b).

## Summary

The majority of boomers approach retirement positively, with a sense of retirement as a time for relaxation and self-indulgence. They also approach their retirement years with a sense of independence and self-reliance. This attitudinal context provides mixed signals for the future of volunteering. While on the one hand a positive and active life orientation is a foundation for volunteering, the self-indulgence and independence of the boomer cohort provides an opposite

orientation. For the most part boomers expect to remain in their current communities, which is an important plus considering the role of community connection as a predisposition to volunteering.

## Motivations for Volunteering

Like other adults and as reported in AARP's civic involvement survey (1997), boomers say that helping others and making the community a better place are the primary reasons for volunteering. Boomers are slightly more likely to mention "being with people I enjoy," which comes in third, and "sharing my ideas with people," which is the fourth mention. Older persons are more likely to mention that volunteering is a "duty as a citizen," which is ranked fifth in both groups. In a related response, older persons are seven points more likely than boomers to say they "didn't want to say no" (17 percent vs. 10 percent). The biggest difference between the two cohorts is the degree to which "religious commitment" is cited as a motivator, with 42 percent of older persons but only 31 percent of boomers citing this rationale.

The AARP state volunteer surveys (2003c) found the general desire "to help people" was most often cited as a "very important" reason for volunteering (67 percent), followed by a desire to "make my community a better place" (56 percent), and a "personal commitment to a cause or a belief" (54 percent). This group also said they were most likely to be motivated by "the opportunity to learn about issues that affect people 50 and over" (46 percent), "developing new friendships" (38 percent) and both "helping older people in the community" and "having fun and socializing" (35 percent each). They were least likely to cite the "opportunity to use professional and leadership skills" (25 percent).

The external data are consistent with some of the findings of AARP's internal research, in that enhanced self-esteem is a major volunteer motivator.

AARP's recently completed multicultural study of volunteering (2003a), utilizing ethnic oversamples, found motivations for volunteering to vary somewhat by ethnicity. All major ethnic groups (non-Hispanic whites, Hispanics, African Americans, and Asian Americans) cited personal responsibility, a sense of satisfaction, concern for the community, and a desire to make a difference among their top five reasons for volunteering. Non-Hispanic whites, African Americans, and Asian Americans were more likely to cite trust in the organization for which they volunteered, while African Americans and Hispanics were more likely than other groups to cite religious considerations as a motivator. Hispanics also tended to attribute their motivation to a desire to stay active, an opportunity

to participate in volunteering with other friends and family members, and a sense that volunteering was a community resource that could in turn benefit their friends, family, or themselves at some later point.

Yankelovich (2002) found an intergenerational consensus in the value of volunteering, with three out of four adults 16+ agreeing that “everyone should donate some of their time for volunteer work” regardless of age. A little over 10 percent strongly agree with this idea, and this percentage is also consistent across age groups. Yankelovich also found that about a fifth of the population is so committed to volunteering that they describe themselves using this label, and again this percentage is consistent across age groups.

Just as about half of the adult population reports some level of volunteering, Yankelovich (2002) found that almost two-fifths of the adult population (38 percent) reports that volunteering for a community, charitable, or nonprofit organization is “rarely/ever worth the effort.” Again, however, the relatively favorable response of boomers is noted, in that the percent who feel this way drops to 35 among those 35–49 and 34 among those 50–64, but rises to 44 percent among those 65+. Conversely, a majority, 55 percent, feel that such behavior is “always/occasionally” worth the effort. Once again a curvilinear relationship with regard to age is noted. A bare majority (51 percent) of the youngest age group feels this way, compared to 58 percent of those 35–49, 59 percent of those 50–64 (the two boomer groups), and 45 percent of those 65+.

## Implications of Motivations for Volunteering

Boomers are less likely than older cohorts to volunteer out of a sense of duty or obligation and more likely to volunteer as part of a social interaction, which has implications for recruitment and retention. They are also less likely to volunteer out of a sense of religious commitment, although religious institutions remain a primary focus for volunteer activity.

## 4

## Behavioral Trends

### Faith-based Organizations as a Focus of Volunteering

Religious organizations play the dominant role in community service and volunteering, both for the public in general and for boomers specifically. In the AARP civic involvement study (1997), religious organizations were the most frequently cited object of volunteer efforts (33 percent), followed closely by school/education groups (32 percent). Youth activities (17 percent), neighborhood/community activities (16 percent), disease-related causes (14 percent), and health care (12 percent) rounded out the list.

Boomers volunteer most of their time with school organizations (42 percent), consistent with their life stage, while only 19 percent of older persons do so. Religious volunteering comes in a strong second for boomers, however, at 34 percent, and increases to 39 percent among older persons. Volunteering for youth groups also shows major differences by cohort, with 21 percent of boomers and 6 percent of pre-boomers volunteering for such groups. Boomers are less likely to volunteer for disease, health care, housing, or elderly-focused efforts compared to their older counterparts.

A majority of volunteers (56 percent) in the UPS survey (1998) said that at least some of their volunteer work is “sponsored or organized by religious organizations.”

The General Social Survey (National Opinion Research Center 1996) also found the most predominant volunteer activities to be focused on religious organizations (24 percent), followed by education (17 percent), youth activities (15 percent), and health (10 percent). These were the only types of volunteer activities attracting 10 percent or more of adults.

The Independent Sector surveys (2001) have also found that religious volunteering (14 percent) was a major factor, followed by youth, education, and human services at around 10 percent. Education and charitable activities draw the most interest from potential volunteers, according to the Prudential Spirit of Community Adult Survey (1995), with political activities drawing the least interest.

AARP's state-level surveys (2003) have found that the most common aspect of involvement was through religious organizations (37 percent), followed by civic organizations (16 percent), community action (15 percent) and school-related activities (16 percent).

The AARP civic involvement survey (1997) found that church attendance was the best and most consistent predictor of several dimensions of community involvement, including social involvement, organizational membership, and volunteering. The only other significant driver was newspaper readership, which tends to be associated with community involvement. Research from the Independent Sector (2001) has corroborated this finding. More recently, Harvard's Social Capital Community Benchmark Survey (2001) found that religious involvement and tolerance of cultural diversity were "two important components of civic engagement."

Older Americans are most interested in raising money for charities such as churches, schools, or universities (43 percent), helping the elderly (40 percent), and working with children and youth (32 percent), according to the Civic Ventures survey conducted by Peter D. Hart Research Associates (1999).

The AARP Staying Ahead of the Curve survey (2003b) of workers 45+ found them strongly connected to their community, with half reporting a strong connection with work (50 percent), followed by religion (45 percent), coworkers (44 percent), hobbies (43 percent), neighborhood (41 percent), age-related groups (39 percent), professional groups (18 percent), racial-ethnic groups (17 percent), and alumni groups (9 percent).

The AARP intergenerational volunteering survey (Harootyan and Vorek 1994) found that religious-affiliated volunteering accounts for almost half (45 percent) of volunteer activities, with education/tutoring second. As with other research, this survey also noted that education-oriented volunteering skews toward younger age groups, as does youth volunteering, while health care and senior volunteering skew toward older cohorts.

## Religious Volunteering: Implications for the Future

How big a role religious organizations will play in the future as a catalyst for boomer volunteering remains to be seen. Roper-ASW tracking surveys found that boomers express less confidence in most institutions, including organized religion, than their older counterparts. Boomers themselves are less confident in religion than they were in previous decades, according to Roper-ASW historical data and more recent survey data collected by AARP. In any case, religious volunteering

remains a cornerstone of activity for all generations, including boomers, another aspect of the stability of the volunteer process across time and generations (AARP 2002d).

## Volunteer Activities

Boomers' volunteer work is very similar to that of older volunteers. According to the AARP civic involvement survey (1997), fundraising is most common (30 percent of boomers vs. 29 percent of older persons), followed by organizing events (26 percent vs. 24 percent) and teaching (17 percent vs. 15 percent). Boomers are more likely than their older counterparts to do physical labor (17 percent vs. 13 percent), sell goods (14 percent vs. 7 percent), or provide child care (12 percent vs. 4 percent), while older volunteers are more likely than boomers to deliver or prepare meals (15 percent vs. 19 percent).

## Opportunities for Expansion and Barriers to Volunteering

In general, people have positive attitudes about volunteers and volunteering. The Prudential Spirit of Community Adult Survey (1995) found that 67 percent of adults think it is very important for people to be involved in their communities by volunteering their time. However, 58 percent already report currently "giving some time to a community service activity," creating an "opportunity gap" of 9 percent.

While the Peter D. Hart Research Associates survey conducted for Civic Ventures (1999) found that 40 percent of working respondents said that volunteering and community service would play an important role in their plans for retirement, this is lower than the actual current incidence of volunteering among the general public.

Similar findings emerged from an AARP survey (2001) of adults 45+ that compared levels of activity in various areas versus purported levels of enjoyment of those activities. The following breakouts emerged for individuals 45+:

Like to volunteer/actively volunteer.....	50%
Like to volunteer/don't volunteer .....	23%
Dislike volunteering/actively volunteer.....	2%
Dislike volunteering/don't volunteer .....	25%

Three out of four adults 45+ have consistent behaviors and preferences, in that they like to volunteer and are actually doing it or that they do not care for volunteering and are not active in this area. A little over a fifth could be considered “potential” volunteers, in that they like to volunteer but are currently not volunteering. This percentage is reduced by those who typically volunteer but currently are between volunteer opportunities. It is also reduced by those whose health or other personal situation limits their ability to volunteer. This explanation is particularly likely given that many of the individuals who fall into this category are age 75+.

These percentages correspond to those in the AARP civic involvement survey (1997), which found that 16 percent of nonvolunteers, or 9 percent of the total population, were interested in volunteering but not currently doing so. Of those not currently volunteering, the survey found a similar interest in increased volunteering across the generations. It noted that 15 percent of boomers are “very” interested and 46 percent are “somewhat” interested in volunteering in the future (vs. 26 percent of younger and 10 percent of older adults who are “very” interested). This population of interested nonvolunteers tended to be relatively younger than the total population, to frequently attend religious services, and to be parents of school-age children, newcomers to the local area, and those holding multiple group memberships. The study found the key predictors of civic engagement, a precursor to volunteering, to be community attachment, church attendance, and income.

The merged AARP state member surveys (2003c) found that 11 percent of members would “definitely be interested in” volunteering their time with “worthy organizations in their community,” a figure that ranged from 9 percent to 14 percent in individual states.

Gallagher (1994) stated that “one of the great freedoms of aging is the freedom not to feel obligated,” and quoted respondents as saying, “I’ve gotten to the stage where I can say no. I couldn’t before, but now I can. When you’re young, you don’t know enough or don’t have the nerve, but sometimes it’s better.” Obligated time increases, given the need to provide care at various levels for primary or secondary family members, who are more likely to need some form of assistance as they age. These obligated commitments reduce desire to formally volunteer in an organizational context. The author concluded, “To the extent that the new volunteerism attempts to reobligate the elderly in caring for those who are neither family nor friends, these policies may result in greater resistance within the very population they are intended to mobilize.”

Chambre (1990) suggested that while for older persons “volunteering is commonly assumed to be a substitution of roles,” recruitment may be more effective if “volunteering might be identified as a leisure substitute—an alternative to expressive and sometimes expensive leisure activities.” She

added, "Various organizations and programs have expanded participation by providing interesting work-family-leisure substitute opportunities that sustain involvement across the life span." If we are to expand this cadre, "we need to learn more about how to harness the energies of less active people who may not have had a lifetime of successful involvement in either their paid jobs or their community work."

Another perspective she offers is that this leisure substitute is in contrast to "a substitution of roles." Many current volunteer programs define roles in kinship terms, such as foster grandparent, parent aide, big brother, and so on. While this may be attractive to some, it is less attractive to others who may not be seeking a replacement or creation of a quasi-family role, especially boomers, who are more independent and tend to reside in smaller households with fewer family connections.

The AARP Funstyles Survey (2002b) found that more than 20 percent of boomers "pretend" to like doing volunteer work "often" or "occasionally." This tends to be an age- and gender-related phenomenon that peaks among men ages 18–34 (40 percent) and drops to 13 percent for women 55+. It is consistent with other survey data that finds some volunteering to be conducted out of a sense of obligation or duty, as opposed to being truly "voluntary."

The Funstyles Survey also found that the percentage of individuals who "really love" to volunteer is relatively stable across age groups. At any age group, about one-fifth of the population feels this strongly about volunteering, although the feeling is more common among women and increases to about one-fourth of the population among those 65+. Nonetheless, this level of preference occurs relatively infrequently compared to the percentages of boomers who say they "love" to engage in such activities as spending time with family and friends. Other preferences noted more strongly among the 65+ population compared to the boomers involve spending time with spiritual/religious activities and watching television.

The AARP Boomers at Mid-Life survey (2002a) found that when self-assessing their current situation, boomers would most like to change either their finances (35 percent) or their health status (27 percent). They are relatively satisfied with other aspects of their life, and relatively few look to make changes in aspects of their life more directly related to volunteering, including their work/career (14 percent), their leisure activities (8 percent), and their spiritual/religious activities (7 percent).

Van Willigen (2000) found that life satisfaction is higher among older persons in general, but particularly higher among those who volunteer.



The AARP intergenerational volunteer survey (Harootyan and Vorek 1994) found that several attitudinal factors correlate with higher rates of volunteering. More altruistic attitudes, a sense of equity/fairness, positive perceptions of the contributions of others, a positive view of the quality of life, larger households, and higher expectations of intergenerational support are all associated with higher levels of volunteering. While these findings are consistent with other literature, they are in contrast to the prevailing boomer attitudes of independence, self-reliance, and lower expectations of or preferences for intergenerational support, as reported in other boomer-specific studies. The research also pointed out the degree of informal assistance given, finding that 89 percent of all adults and 70 percent of those 65+ provide informal assistance to others in their communities.

Okun, Barr, and Herzog (1998) have developed a factorial design-based motivational model that demonstrates variation by age. They have identified six factors motivating volunteering: the career considerations of the volunteer; personal enhancement of the volunteer; protective actions undertaken to compensate for a volunteer's perceived personal or social issues; socialization; self-development in terms of greater understanding of the focus of the volunteer activity or those being helped; and a value system that validates such behaviors. In general, they have found the personal development goal of enhancement/self-esteem building to be the biggest factor, followed by understanding, protective, social, and career considerations, with the values-based rationale being the least powerful driver. The research underscores that this tangible, self-benefit component of volunteering needs to be considered in any volunteer recruitment or facilitation effort.

With increasing age, the socialization factor grows in importance. This factor is not surprising given the reduction in the role of other social networks (work, family, etc.) in connecting an older person to the community. To some extent the enhancement and self-protection factors also become more important as career considerations diminish in significance.

Rotolo (2000) found that "an individual's position in the family life cycle affects his or her involvement in voluntary associations." In addition, his research found that "full time work status influences joining positively."

Younger people tend to join and leave organizations relatively frequently. As their career stabilizes and they build ties to a particular community, there is less joining and more continuous membership, thus contributing to the high level of volunteering and organizational memberships at mid-life. As individuals mature, they retain memberships in some organizations, leave those that are no longer directly relevant to their new life stage, and typically are less likely to join new ones. Thus,

older persons tend to be less likely to join new organizations but stay longer with the ones they are already in, demonstrating higher satisfaction and greater commitment. Rotolo also corroborated the role of marriage in enhancing memberships by broadening the social networks, as well as the independent effect of gender, with women likely to be more active joiners than men.

Omoto and Snyder (2002), in their study of AIDS volunteers, cited the expected motivation for volunteering, that of personal values (self-expression of those values; satisfying, felt humanitarian obligations to help others; community concern; greater personal understanding; personal development/challenge; enlarging the social network; and increasing self-esteem). They also pointed out the importance of the local community context, and they recommend that a successful volunteer activity be “embedded in a community context” and feature an “inclusive, psychological sense of community.”

In a Roper-ASW tracking survey (2000), 16 percent said they “especially liked” doing volunteer work/community service, which placed it 24th on a list of 26 possible activities, only ahead of “getting prepared for work” (15 percent) and “going to a casino/gambling” (10 percent).

In the Harvard Social Capital Community Benchmark Survey (2001), boomers were most likely to say that either the practical concern of their work schedule or inadequate child care was a barrier to greater volunteering. Secondary obstacles were inadequate transportation, feeling unwelcome, concerns for safety, and lack of information. Of these, only the work schedule and the lack of information were significantly less likely to be cited by those older than the boomers. Roughly one-quarter of each category of respondents said that a feeling of not being able to make a difference was a factor, a perception that was relatively limited and consistent in its prevalence across all age groups. The UPS survey (1998) concluded:

*Making “better use of talents, skills, or expertise” appears to be a bit less important to attracting volunteers than making good use of time. Half (50 percent) say that given available time, they would volunteer for this type of organization. People do not always volunteer for activities that use their job skills. Habitat for Humanity uses many unskilled “carpenters.” The people who volunteer for concession stands are not necessarily using high-level expertise or talents. The expectation for efficiency is not as high for talents as it is for time.*

This time efficiency is seen as even more important when those who have stopped volunteering for an organization are asked the reason for this change. The primary reasons tend to be personal. These include demands on time (65 percent) and ending involvement with the organization in general (32 percent). Poor volunteer management practices are less important, with poor management cited by 26 percent, inefficient use of time by 23 percent, poor use of volunteers' talents by 18 percent, unclear task definition by 16 percent, and lack of recognition by 9 percent.

## Implications for Boomer Volunteering

Most boomers favorably predisposed to volunteering are already doing so. Boomers are less likely to volunteer out of a sense of duty or obligation than are older cohorts. Efforts to engage boomers in volunteer activities as they age would probably be most successful by focusing on maintaining the involvement of current boomer volunteers. Appeals likely to succeed with this group would include those focusing on self-development, self-interest, and volunteering as a social, beneficial, enjoyable experience. The volunteer experience needs to be presented as an opportunity, one which is time efficient, community based, and familiar. Extending current involvement or using current organizations and activities as a bridge to others have the greatest potential for success.

## Public Preferences for Community Service Leadership

Respondents to the Prudential Spirit of Community Adult Survey (1995) said that the most effective approach for “promoting community volunteerism” would be “development of educational programs aimed at high school students to promote volunteer work in the community,” closely followed in popularity by “business-led efforts...to support community volunteerism. Among five possible options to promote community involvement presented to respondents, these items were the most popular, with more than 80% of the respondents feeling that these options would be “extremely” or “moderately” effective. Close to 80% felt that the other three options would also be effective. These included, in order of perceived effectiveness, “having business encourage its own employees to volunteer,” “increased news media attention to volunteerism,” and “partnerships between public and private organizations that encourage community involvement.”

These public preferences focus directly on two emerging trends, specifically the increased use of service learning in the schools and the increased involvement of private-sector volunteer and service efforts, especially those focused on companies' employees. The National Center for Education Statistics (1999) reported that over half (52 percent) of students in grades 6–12, or over 14 million

middle- and high-school students, are now engaged in some form of community service (if not purely “voluntary” service) through service learning. The Pew Civic Partnership Study (2001) found that other institutions cited by the public as being likely sources of community service development tend to have a strong community base and a personal connection. These included local police departments and nongovernmental organizations (NGOs) like the Salvation Army, Goodwill Industries, and Habitat for Humanity.

Independent Sector (2001) recommended that “organizations need to be more in tune with the attitudes and values of people today to attract the volunteers they need,” and stated, “People are drawn into volunteering at different stages in life as a result of connections made through family and work.”

According to the Independent Sector (2001), the primary motives for service include gaining a sense of satisfaction, having special qualities or skills, making a difference, and feeling an obligation to give back.

Volunteering makes people feel good about themselves, and this factor was found to be the most important reason for volunteering (70 percent) in the Prudential Spirit of Community Adult Survey (1995). Other reasons included learning new skills (67 percent), having roots in the community (60 percent), a positive previous volunteer experience (53 percent), the opportunity to give something back to the community (51 percent), the social aspects of volunteering (49 percent), and public recognition (35 percent).

Expecting that the organization utilizing their volunteer efforts would make good use of their time was the volunteer aspect most strongly related to a willingness to increase volunteer time (58 percent) among six items listed. This was followed by a reputation for good management (52 percent), making better use of talents (50 percent), having more clearly defined tasks (41 percent), feeling that the experience would help their career (39 percent), and knowing they would be thanked (31 percent).

In the Independent Sector research (2001), those who do not volunteer cited several reasons for this, including lack of time (39 percent), the demands of most volunteer commitments (23 percent), an inability to find a suitable activity (11 percent), and not being asked (10 percent).

The Prudential survey (1995) also found lack of time because of work or family commitments to be the biggest barrier to increased volunteering, cited by 65 percent. Other factors cited included a preference

for leisure (64 percent), lack of roots in the community (62 percent), a feeling that one individual cannot make a difference (59 percent), and negative previous volunteer experience (58 percent).

More than one out of three respondents (38 percent) said they would like to do more volunteer work. This ratio was fairly consistent across volunteer status, with 31 percent of those not volunteering and 34 percent of those currently volunteering interested in doing more.

While some theories speak to the political activism of the boomer cohort in their younger years as a rationale for expecting higher levels of volunteering in retirement, the AARP intergenerational volunteer survey (Harootyan and Vorek 1994) found that support for reduced government activity in social support areas is a correlate of volunteering. Recent Roper-ASW tracking survey data (2000) backed this up, finding little difference in attitudes towards government or the appropriate role for government between the boomer cohort and those who are older.

Moreover, current data indicate that at present boomers are no more likely than the older generation to participate in political activities. While 63 percent of boomers participated in no political activity other than voting in the last year, that percentage stood at 70 percent for both the 50+ population and all respondents, according to Roper-ASW data (2000).

## Issues that Should Be Addressed through Community Service

A Pew Partnership for Civic Change survey (2001) found that the problems considered the most serious and in need of addressing via community service efforts focused on the well-being of families and children. The top ten community-specific issues were the lack of living-wage jobs, a decline in moral values, inadequate affordable care for the elderly, lack of affordable housing, teenage pregnancy, traffic congestion, lack of affordable child care, illegal drugs, availability of affordable health care, and lack of child supervision.

## Organizations Expected to Play a Community Service Role

Many organizations are seen as potential players in the area of community service at the local level. The Pew survey (2001) asked respondents to list potential problem solvers on a top-of-mind basis, and the most typical mentions included local police departments, local religious institutions (which are currently by far the main focal point of these kinds of activities), nonprofit organizations (specific organizations mentioned included the Salvation Army, Goodwill Industries, and Habitat for Humanity), friends and neighbors, and parent and teacher associations at local schools.

## 5

## Summary and Conclusions

**The aging of the baby boom presents both opportunities and challenges with regard to maximizing their volunteer potential. The size of this generation, coupled with its already extensive volunteer activity, provides a “jump-start” to this process. The life stage of boomers contributes to a high incidence of current volunteering. Boomers are most likely to be volunteering with youth-focused activities or activities associated with their place of worship. These activities are typically focused on their local community.**

The demographics and anticipated lifestyle changes of the baby boom generation will influence the extent to which this large cadre maintains its volunteer activity. The extent to which boomers remain healthy as they age and maintain economic security in retirement will directly affect their volunteer participation.

Boomers are likely to work longer than the generation that preceded them. While conventional wisdom suggests this would be a disincentive to volunteering, there is evidence to the contrary. Volunteering typically does not substitute for paid work among retirees. Moreover, connections to the workplace can contribute to a broader social network, increased economic security, and better access to health care. These conditions in turn contribute to a greater propensity to volunteer.

The attitudes that boomers hold towards retirement send mixed messages as well. Most boomers anticipate an active, enjoyable retirement, and these expectations are associated with an increased expectation of volunteering. On the other hand, boomers are noteworthy for their independence, self-reliance, and self-indulgence, factors not typically associated with a propensity to volunteer. The religious orientation and practices of boomers will also impact volunteering, given the centrality of religious volunteering across age groups and its enhanced importance in later life.

The demographic relationships and overall incidence of volunteering are relatively stable. This stability suggests that the most productive strategy for increasing volunteering among aging boomers is to maintain the level of involvement among current boomer volunteers, as opposed to attempting to tap the unspecified and perhaps limited potential of those boomers who have yet to engage in this type of service.

Boomers volunteer for a variety of reasons, but are less likely than the generation that preceded them into retirement to volunteer out of a sense of duty or obligation. They are more likely to volunteer as a result of social, self-development, self-esteem, or leisure-focused motivations. Episodic, familiar, community-based opportunities are also preferred. Appeals for volunteer commitment will need to approach boomers in this context.

The diversity of the baby boom generation qualifies these general statements. The racial and ethnic diversity of boomers suggests that volunteerism will be more informal, unstructured, and focused on the extended family than has previously been the case. The community focus of most volunteering, coupled with the diversity of communities in terms of both the incidence of boomers and the capacity to support volunteerism, will be a factor as well. Boomers also differ significantly among themselves with regard to how they see retirement and what they expect from it. Some segments are more favorably predisposed to volunteering than others, depending on their plans and expected life circumstances.

The findings suggest that the successes of any efforts to engage boomers in volunteering as they age will be as diverse as the boomer cohort itself and the communities in which they reside.

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B

# Infrastructure of Volunteer Agencies: Capacity to Absorb Boomer Volunteers

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# Terms

*America's burgeoning older population is poised to become the new trustees of civic life in this country. These individuals have the time to care; they have the skills and experience required; they have the personal need to contribute in new ways. Society desperately needs them, and at the same time, there is considerable reason to believe that older Americans could reap tremendous mutual benefit in the process. This match, between the untapped resources of older Americans and the needs of American communities, constitutes the great opportunity presented by America's aging. — Freedman (1999)*

Attempting to define and categorize “mature” adult volunteers is a formidable challenge. Most people under the age of 70 do not think of themselves as seniors, and many baby boomers detest labels evoking chronological age or separation from earlier stages. This challenge is further compounded by the fact that the excitement around “older adult volunteering” often stems from the civic activity of those in their mid 70s, as well as the civic potential of the graying baby boomers, who are between the ages of 39 and 57.

Because of the wide range of people being discussed, some of the confusion associated with labels and terminology is unavoidable. While they are inadequate and sometimes confusing, in this paper the terms most commonly used to describe “mature” Americans are baby boomers, younger older adults, older adults, and seniors. Generally, these terms are used in the following ways:

- Baby boomers (or boomers) refer to those persons between the age of 39 and 57. There are 77 million baby boomers in America today.
- Younger older adults refer to people 50 to 65.
- Older adults refer to persons 65 and older. There are 35 million older adults in America today.

- Seniors traditionally refers to persons 65 and older. This term is being used less frequently because of its negative and often inaccurate connotations. Moreover, most older adults do not view themselves as seniors until they are well into their 70s, if ever. As a result, this term is used sparingly and when it is used designates programs that typically appeal to persons who are 70 or older.

# Executive Summary

**To date, there are no comprehensive studies that examine the capacity of infrastructure supporting older adult volunteers or its ability to engage the aging baby boomers. There are, however, a number of well-supported observations that offer insight into the current capacity of the older adult volunteering infrastructure. These findings indicate that the number of volunteer opportunities available to older Americans does not reflect the diversity, skills, and needs of this burgeoning group.**

As the 77 million baby boomers begin to move towards retirement, they will place extraordinary demands on the already strained and under-resourced older adult volunteer sector. Without serious action to address the disparity between the capacities and interests of today's and tomorrow's older adults and the limited menu of volunteer opportunities available to them, this nation will miss an unprecedented opportunity for individual and civic renewal.

One of the greatest obstacles preventing boomers from ushering in a renaissance of civic life in America is that the articulation of a new vision for later life, at least at the national level, is outpacing the construction of programs and institutions needed to realize this vision. Though the promotion of the civic engagement of older adults must continue, without additional resources directed towards building the capacity of community-based organizations to utilize this potential tidal wave of volunteers, boomers may find themselves ready and willing with nowhere to go. To the extent that this is already happening throughout the nation, federal and local governments, foundations, and corporations must quickly direct significant resources towards developing model programs and initiatives that support the civic engagement of older adults.

Older Americans (65 and over) volunteer more time (96 hours/year) than any other segment of the population (U.S. Department of Labor 2002). Referred to as "Super Volunteers" by some volunteer coordinators, these adults when successfully placed and supported are often the most reliable and committed of all volunteers. However, only 22 percent of older adults volunteer, less than any other segment of the American population. Reasons for this low level of engagement



can be significantly attributed to the “spotty” landscape of volunteer opportunities and incentives tailored specifically to this population.

With more older adults more interested in volunteering in new and unique ways than ever before, the demands on this segment of the volunteer infrastructure will multiply in the near future. According to a poll conducted by Peter D. Hart Research Associates, adults ages 50 to 75 reported that, beyond traveling, volunteering is what they look forward to doing most during retirement (Hart 1999). In the next 20 years, the population of persons 65 and older in the United States will double as 77 million baby boomers retire. In 2050, there will be over 80 million Americans 65+.

The challenge of successfully tapping the potential of this enormous pool of volunteers must be approached from two directions: First, the quality, quantity, and scope of volunteer opportunities available to older adults must be increased. Second, new and expanded channels for the engagement of the boomers must be constructed, such as informal, workplace, singles, family, and team volunteering.

Though the costs to national and local nonprofits, Volunteer Centers, foundations, government, and businesses are high, the individual and societal rewards of older adult volunteering are far greater. Boomers, the most committed volunteers today, gave a median of 52.5 hours per year per volunteer (U.S. Department of Labor 2002). Extrapolating from current Independent Sector’s figures and statistics, we can expect that as boomers reach their mid 60s, more than doubling in number today’s 65+ population, they would give well over 5.4 billion hours of service for a value that will easily exceed \$80 billion. Beyond the societal rewards, it has been shown that people who are helpful to others reduce their risk of dying prematurely by nearly 60 percent as compared to their peers who provide no such support (University of Michigan 2002).

## 1

# Introduction

After World War II, a new generation (1946–1964) was born to a uniquely American postwar era of prosperity, social freedom, and anticipated longevity. With redefined American values and an unprecedented cultural identity, boomers are now emerging as an aging population considerably different than their parents. Examining the challenges and benefits of successfully engaging this powerful and massive group in significant service opportunities, one must consider the sheer size and diversity of this segment and the growing notion that retirement is the beginning of a new and busy chapter of life, a time for continued learning and development, skill building, forming new and purposeful relationships, and giving back to the community.

The older adult demographic in the United States continues to grow significantly. The magnitude of this demographic shift can be most clearly understood by noting that the senior segment today is more than twice what it was in 1960 and is expected to double again in the next 20 years (Bronfman 2002). Today there are about 13 million Americans over the age of 65; by 2050 it is projected that the number of Americans in that age group will climb to over 80 million (Federal Interagency Forum on Aging-Related Statistics 2000). Thus, if this next wave of older adults were to volunteer at the same rate as their predecessors, the infrastructure that supports these volunteers would need to respectively increase the number it engages.

Moreover, with 70 percent of non-retirees reporting that retirement is “a time to begin a new chapter” in life and that, just beyond traveling, volunteering is what older adults look forward to most during this new stage of their life, the percentage of older Americans volunteering could potentially increase dramatically. According to a recent poll conducted by Peter D. Hart Research Associates, it was found that small inducements such as learning new things, making new friends, and putting career skills to good use could double the older-volunteer force in the United States (Kleyman 2003).

With the number of people 65 and above expected to double in the next 20 years and the potential to increase this cohort's volunteer base twofold by providing appropriate incentives, the number of older adult volunteers could theoretically quadruple by the time the boomers are between the ages of 59 and 77.

Though these numbers are impressive, this positive scenario hinges on whether or not institutions and organizations currently working with older volunteers have the capacity and receptivity to adjust their volunteer management practices to take into account the unique needs and desires of 77 million boomers.

Barbara Weiderecht of the Volunteer Center of Bergen County, New Jersey, echoes the industry's deepest concerns: "Today's older volunteers do not want to be thought of as just office help or 'envelope stuffers' and are increasingly turning down all such opportunities. Yet when this is addressed with many of the agencies we place volunteers at, they do not understand nor do they want to hear it. 'What do they expect? They're only volunteers,' is a frequent reply. That attitude is deadly for attracting volunteers."

Coined "vigilante volunteers" in *Boom, Bust & Echo 2000*, many boomers come from a post-parenthood group of middle-aged professionals with significant finances, seeking fulfillment through serving the community (Foot and Stoffman 2000). Still active in the workforce, they are specific about how they commit their time and resources towards volunteering (Volunteer Canada 2001). And while many boomers fall outside the privileged socioeconomic profile of a "vigilante volunteer" and will have to work throughout their "retirement" years just to make ends meet, boomers from all different segments of society will have numerous aspirations and obligations during later life, including caring for their parents and/or grandchildren. Accordingly, boomers will look for volunteer opportunities that meet not only the needs of the community but also their own yearnings to connect in a meaningful way with friends and family and to learn new things and develop new skills.

## 2

## A Statistical Profile of Volunteering

This section describes the state of volunteerism in the United States. The figures below reveal that volunteerism is alive and well in communities across the nation, but that this is largely due to the commitment of a core group of citizens who make service a central component of their lives. The sections to come will suggest strategies for expanding the volunteer base, particularly to include larger numbers of boomers.

According to the Bureau of Labor Statistics of the U.S. Department of Labor, about 59 million people (or 27.6 percent) performed volunteer work between September of 2001 and September of 2002. The survey found that more than one in four persons age 16 and over volunteered.

Some highlights from this study that help to define the scope of volunteering in the United States include:

- Rates of volunteering are higher among women than men (31.1 percent and 23.8 percent respectively).
- Among persons 25 years of age and over, the volunteer rate of college graduates was four times that of high school dropouts.
- The main organization for which the majority of volunteers served was either religious or educational/youth-service related.
- Volunteers spent a median of 52 hours volunteering during the year.
- While 28.2 percent of volunteers reported spending 100 to 499 hours doing volunteer work, 21.5 percent spent only 1 to 14 hours volunteering.

- Adults 35 to 54 years old were most likely to volunteer, with one in three having donated a median of 52.5 hours of their time.
- Volunteer rates were lowest among persons age 65 and over (22.7 percent). This demographic group, however, devoted the most time (a median of 96 hours) to volunteer activities.
- Two out of five volunteers became actively involved with the primary organization for which they did volunteer work on their own initiative. Another two out of five people were asked to become a volunteer, most often by somebody in the organization.

The Independent Sector is a nonprofit research organization that develops a periodic survey on giving and volunteering in the United States. Their research has found the rate of volunteering among Americans to be much higher than the rate the Bureau of Labor Statistics has found, 44 percent compared to 27.6 percent. Significant figures from Independent Sector's latest survey, which illustrate this difference as well as some unique findings, include:

- 44 percent of adults—or 83.9 million adults over the age of 21—volunteered in 2000.
- Volunteers gave an estimated 15.5 billion hours to formal organizations in 2000.
- Fifty percent of all people were asked to volunteer. Individuals who were asked to volunteer were much more likely to volunteer (71 percent) than those volunteers who had not been asked (29 percent).
- The volunteer workforce represents the equivalent of over nine million full-time employees whose combined efforts are worth an estimated \$239 billion.

The Independent Sector reports that while there are several factors responsible for the disparity between the levels of volunteering reported in Bureau of Labor Statistics and those of their own study, the most significant is that they polled 4,216 adult Americans, whereas the Bureau of Labor Statistics reached over 60,000. The Independent Sector's survey population was also limited to persons over the age of 21 who were only able to account for their own volunteer activities, while the Bureau of Labor Statistics survey included anyone over the age of 16 with respondents reporting the volunteer work of an entire household.

Despite these differences, the trend data of the Bureau of Labor Statistics complements and confirms Independent Sector's findings on the following:

- Religious beliefs have a powerful influence on community engagement and volunteering;
- There is a correlation between education and employment in rates of volunteerism;
- Volunteering among America's young people is growing;
- Family involvement is important in volunteering; and
- Simply asking people to volunteer transforms inactive or informal volunteers into sustained supporters of an organization or cause.

## 3

## Today's Older Volunteers

**The information regarding older adult volunteering provides a mixed outlook. As the U.S. Department of Labor reports, volunteers age 65 and over devoted the most time—a median of 96 hours—to volunteer activities. However, at 22.7 percent, volunteer rates are the lowest among older volunteers (U.S. Department of Labor 2002).**

The contrasting data reveal two patterns. First, and more optimistically, this confirms what volunteer coordinators from around the country report about working with older volunteers. Although an underrepresented subset of the volunteer pool, when successfully placed and supported, these adults are often the most reliable and committed volunteers that coordinators engage.

Second, and less optimistically, these figures show that a small population of people are performing the majority of the volunteer work in this country. This not only holds true for older Americans but also applies across generations, as 28.2 percent of all volunteers reported spending 100 to 499 hours performing volunteer work in 2002, while 21.5 percent spent only 1 to 14 hours volunteering that year (U.S. Department of Labor 2002).

With the boomers less likely than their parents to sign up for regular volunteer assignments or most other civic commitments, this may indicate the beginning of larger problems: the failure of agencies to diversify their volunteer base and the eventual burnout of current “high-volume” volunteers (Graff 2002).

As shown in Table B-1, the ways in which volunteers 65 and over give of their time are numerous. The overwhelming majority of those activities (45.2 percent) are performed with or through a place of worship. While some of these activities are focused on supporting the faith community itself, most religious organizations also have extensive outreach programs to serve individuals in economic and personal need. The remainder of older adults' volunteer work is divided among social, community service, health care, civic, political, and international organizations, among others.

**Table B-1: Percent Distribution of Volunteers Aged 65 and Older by Type of Main Organization†**

Characteristics in September 2002	Total volunteers	Civic, political, professional, or international	Educational or youth services	Environmental or animal care	Hospital or other health	Public safety	Religious	Social or community service	Sport, hobby, cultural, or arts	Other	Not determined
65 years and over	7,492	7.9	6.5	1.0	10.5	1.2	45.2	17.6	4.2	4.0	2.0

†Main organization is defined as the organization for which the volunteer worked the most hours during the year. Data on volunteers relate to persons who performed unpaid volunteer activities for an organization at any point from September 1, 2001, through the survey period in September 2002.

Source: U.S. Department of Labor 2002.

There are several long-standing senior volunteer programs, such as the Foster Grandparent Program created in 1965, which have successfully helped to meet the needs of older adults and communities.

Although the accomplishments of such organizations that engage older adult volunteers are many, “senior” volunteer programs have struggled to reach a broader array of older adults. Although there are many reasons for this, there is a generally accepted belief within the volunteer and service arena that the landscape of older adult volunteer opportunities is “spotty” (Freedman 1999). Accounts of passionate and skilled older adults showing up at nonprofits to offer their time and services only to be turned away have become commonplace. Until the hype around the civic potential of older adults is translated into model programs, trainings, effective practices, and funding, the mature volunteer workforce will continue to walk away frustrated by an inadequate response from the nonprofit sector.

Despite these challenges, the civic involvement of older adults continues to receive warranted attention from politicians, nonprofits, social scientists, and other key groups. The combination of the world’s changing demographics, the broad economic, civic, and social implications of these changes, and the increased demand for volunteers have facilitated the growth and innovation of the aging field despite many environmental and infrastructure challenges.

The Front Porch Preparedness program of Volunteer Florida, an urban revitalization initiative that works with underrepresented populations in planning and implementing programs for their communities, is just one of the many innovative programs in this area. Through Front Porch Preparedness, volunteers learn to recruit older adults, veterans, and their families to become leaders in implementing community disaster resistance programs. Another organization that taps into a unique segment of this population is Volunteers in Medicine. Providing free medical and dental services to families and individuals who otherwise have no access to health care, Volunteers in Medicine engages retired medical professionals, currently practicing volunteers, and community volunteers.



# 4

## Boomer Volunteers

According to the Bureau of Labor Statistics (U.S. Department of Labor 2002), persons 35 to 54 years of age were most likely to volunteer, with one in three having donated their time. The boomers' demographic, between the ages of 39 and 57 in 2003, make up the majority of this segment. A significant number of boomer volunteers give of their time through educational/youth-service related organizations.

**Table B-2: Percent Distribution of Volunteers Aged 35 to 54 by Type of Main Organization†**

Characteristics in September 2002	Total volunteers	Civic, political, professional, or international	Educational or youth services	Environmental or animal care	Hospital or other health	Public safety	Religious	Social or community service	Sport, hobby, cultural, or arts	Other	Not determined
35 to 44 years	15,089	4.6	39.9	1.4	6.6	1.2	29.3	9.5	3.9	3.1	1.0
45 to 54 years	12,296	6.4	25.5	1.6	8.7	1.4	34.5	11.0	5.1	3.8	2.0

†Main organization is defined as the organization for which the volunteer worked the most hours during the year. Data on volunteers relate to persons who performed unpaid volunteer activities for an organization at any point from September 1, 2001, through the survey period in September 2002.

Source: U.S. Department of Labor 2002.

As shown in Table B-2, data from the U.S. Department of Labor indicates that:

- Persons age 35 to 44 (many of whom are young boomers) volunteer more than any other group. The largest part of their volunteer work (39.3 percent) is for educational/youth-service related organizations.
- Persons age 45 to 54 (many of whom are older boomers) are the second most active group of volunteers. The largest part of their volunteering is done for religious organizations (34.5 percent). The second largest is educational/youth-service organizations (25.5 percent).

Consistent with their life stage, boomers with children under the age of 18 are more likely to volunteer than are persons without children in this age group. In addition, parents are more than twice as likely to volunteer for an educational/youth-service related organization than are their peers without children (U.S. Department of Labor 2002).

This data raises key questions about the relationship between parenthood and volunteer participation and whether boomers, currently some of the most engaged volunteers in the country, will continue to serve their communities after they have finished caring for their children. And while it is a fact that people who volunteer as youth are more likely to volunteer as adults, it remains to be seen if individuals who volunteer as parents will continue to be involved as older adults.

Less involved in places of worship than their predecessors, boomers' lower level of religious affiliation may also negatively impact older adult volunteerism. Affiliation with a formal religious organization has traditionally been a key predictor of charitable behavior (Independent Sector 2001a). Moreover, AARP's 1997 Civic Involvement Survey found that the biggest difference between the boomers' and older adults' motivations for volunteering was the degree to which "religious commitment" was cited as a motivator, with 42 percent of older persons but only 31 percent of boomers citing this rationale.

To ensure the 77 million boomers continue to volunteer at the same impressive rates they do today, more diverse volunteer channels must be developed, beyond involvement with educational/youth-service organizations and places of worship.

## Innovative Paths to Volunteer Opportunities

Boomers and older adults have already begun to make their mark on volunteering by choosing some nontraditional ways to get involved in their communities. Three examples of this are workplace volunteering, family volunteering, and singles volunteering.

### 1. Workplace Volunteering

Workplace volunteering has become a popular alternative for busy employees and their companies. It allows companies to better their communities while simultaneously building employee teamwork skills, building morale, improving corporate public image, and meeting strategic goals. Though many businesses focus on engaging their staff in one-time or episodic events, others have designed progressive programs that enable their staff to stay involved with local organizations and causes.

*Wachovia Bank's "Time Away from Work for Community Service" program allows employees to use four hours of paid time each month to participate in community service volunteerism, educational volunteerism, and parental involvement in education.*

## 2. Family Volunteering

Boomers are also volunteering with their children, parents, and other family members. Volunteering as a unit allows families to make significant contributions to their communities while also providing quality time, strengthening communication, and offering opportunities for family members to serve as role models.

*The Donn family of Tampa Bay, Florida, has turned an annual volunteer event into family volunteering for all generations. Alan Donn and Dorothy Holle-Donn, along with Alan's parents Ruth and Ray, are the organizers of the Florida Coastal Cleanup, a yearly event to help rid local shorelines and oceans of trash and debris. The project started in 1993 with 25 friends, family, and coworkers as volunteers and grew to 97 in 2001. Their efforts have transformed a former dumping ground into a pristine area, now being developed into a public park.*

## 3. Singles Volunteering

Giving back to the community while connecting socially with new people is also proving to be a powerful way to engage boomer volunteers. Addressing the desire of single boomers to form new friendships and romantic relationships, organizations building single volunteer programs have become increasingly popular.

*The organization Single Volunteers now has over 18 chapters across the United States that bring individuals together for service events at national parks, humane societies, and food pantries.*

## 5

## Needs and Motivations of Boomer Volunteers

Considerable work has been done to better understand how boomers believe they can best be of service to their communities, as well as what they hope to receive from these efforts. These investigations have shown that the boomers still dream of making a difference, that they want numerous options of ways to do so, and that they expect these opportunities to be professionally managed and offer incentives that speak to their own personal and economic needs.

*Bringing about a transformation in the actual role of older Americans will require significant cultural and institutional change. We will need to tell a new story about what is possible and desirable in later life, and to create far more compelling opportunities for translating interest into action.*

— Freedman (1999)

Today's boomers are more diverse, healthier, better educated, financially secure, and active than any generation to come before them. To capture the time and talents of this group of 77 million as they transition from their primary careers and family building towards later life, the menu of volunteer opportunities available to this segment must be significantly lengthened and diversified.

Boomers will react strongly to deficiencies in volunteer opportunities. Noting that volunteers in general are not given very challenging work, especially senior volunteers, Jason Tanz and Theodore Spencer of *FORTUNE* magazine (2000) ponder if a large group of skilled older adults will “run for the golf course or part time jobs if they are asked to stuff envelopes or hand out juice and cookies at the local hospital.”

Creating high-impact volunteer opportunities for boomers and, ultimately, innovative pathways towards a new model of retirement will be particularly challenging considering the ethnic, economic, and social diversity of this group. Thoughtful and targeted program development and outreach

techniques that target specific segments of this vast volunteer pool will be required. Designing volunteer opportunities for sophisticated activists, workers, and consumers, however, will assist in successfully attracting, supporting, and retaining most of the boomer populations.

## Activists: Opportunities That Inspire

Boomers came of age during a time that witnessed impressive gains in terms of human, environmental, and civil rights. And while only a percentage of the boomers were involved in the political activism and local organizing that defined the 1960s, an undeniable element of this generation's character is a deep desire to make a difference in ambitious ways.

As a result of the defining ethos of their earlier years and the unprecedented economic expansion of the past two decades, a large number of aging adults have been led towards activities focused on self-fulfillment and self-realization. In "The 75% Factor: Uncovering Hidden Boomer Values," James Gambone and Erica Whittlinger note that 75 percent of boomers came from poor, working-class, family-run farms or small businesses, and feel indebted and thankful to those persons and institutions that helped them along the way. This attitude combined with the focus on self-fulfillment has resulted in one of the defining characteristics of boomers—the desire to give something back to society.

As a result, community-based organizations will benefit by designing and marketing volunteer opportunities for mature activists who dream of significantly impacting their neighborhoods, communities, and world.

## Consumers: A Multiplicity of Volunteer Options

The 50+ population are sophisticated consumers who have come to expect an abundance of options encompassing everything from cereal to places of worship. As a result of the wealth of products and services available to them, they have an acutely defined sense of their own needs and preferences, as well as of what they have to offer and spend. Not only do boomers expect a wide menu of volunteer options to choose from, they increasingly find that time is their most limited commodity. Boomers often struggle to care for both children and aging parents, and as the "stress generation," they find limited hours in the day to meet the demands of their hectic work lives (Team Consultants 2001).

The number of short-term and project-based volunteer opportunities that agencies offer boomers and older adults must be significantly increased. One-time volunteer events such as cleaning a park, planting trees, and sorting clothes at a shelter are all excellent ways to introduce people to volunteerism. But to capture the imagination and long-term commitment of this population, project-based opportunities that reflect the high expectations of agencies and volunteers must be designed and implemented. Short-term research projects, community surveys, and carpentry jobs are examples of opportunities that yield significant results for agencies and satisfaction for volunteers.

## Workers: Professionally Managed Volunteer Programs

Boomers are overworked and thinly stretched. Americans now work more than any other population in the world. According to the International Labor Organization, Americans added 36 hours of annual work during the 1990s and can claim 137 more hours of work than their counterparts in Japan and an astounding 499 hours, or 12<sup>1</sup>/<sub>2</sub> weeks, more than German workers (Freedman 1999).

Despite the long hours that are put in at the workplace, research shows that almost 70 percent of adults plan to continue working into retirement. A recent survey conducted by AARP of workers over the age of 45 revealed that a large majority (69 percent) of those interviewed plan to work in some capacity in their retirement years. More than 34 percent of the total sample said they would work part-time out of interest or enjoyment, 19 percent said they would work part-time for needed income, 10 percent would go into business for themselves, and 6 percent would work “full-time doing something else.” Fewer than 28 percent of the respondents said they would not work at all (AARP 2003).

For those adults who are no longer working, social marketing research reveals that “retired” Americans all along the socioeconomic spectrum cherish their newfound freedom. However, when asked about their overall happiness with the retirement experience, they also express some profound reservations. In particular they reveal a powerful sense of loneliness. What they miss, it turns out, is not only a sense of purpose, but also the bonds they experienced at work. Margaret Mark calls these ties “relationships with a purpose” (qtd. in Freedman 1999).

An important driver for encouraging retirees to volunteer is the chance to regain meaningful identity and relationships, particularly if combined with the opportunity to put existing skills to use (Freedman 1999). The trend towards early retirement, however, is shifting and tomorrow’s older adults are likely to be busier than today’s. Considering the central role their careers play in defining

the boomers' self-worth and identity, it will often be through the lenses of their career experiences that boomers will evaluate volunteer opportunities. Service experiences should be designed that are time- or project-limited and offer new opportunities to achieve the level of professionalism and respect that the volunteers had, or aspired to have, during their careers.

Understanding these needs, the Volunteer Center in Columbus, Ohio, has created a technology initiative run by a team of volunteers to access its IT requirements and capacities and to build a system capable of meeting the Volunteer Center's growing needs in this area. Though there is a staff liaison who is actively involved in the project, volunteers will rely upon their skills and experiences to drive the process, while simultaneously building friendships grounded in meeting an important community need.

Despite the emphasis being placed on the importance of crafting more dynamic and challenging volunteer opportunities, there will continue to be many volunteers who are more interested in helping organizations fulfill typical and routine duties. Volunteers with high stress jobs, for example, have sometimes shown a preference for taking on administrative tasks with teams of volunteers, meeting their need to contribute as well as spending time with colleagues or friends without the pressure they deal with at work. Therein lies one of the greatest challenges of working with this emerging group: Agencies need to find that segment of the volunteer pool that can best help achieve their mission and that they, in turn, can meet their altruistic and personal longings.

## 6

# Barriers to Volunteer Engagement

**This section discusses the most significant barriers to the boomers' volunteer engagement. Time constraints, lack of promotion, and inadequate volunteer management are singled out as some of the most significant factors preventing higher levels of volunteer involvement among this population.**

There are numerous barriers to the recruitment of volunteers. Some of the more typical examples, which often hold true across demographic lines, include transportation issues, menial tasks, lack of job description, and unclear impact. Of the most common barriers to volunteer engagement, three deserve further attention, especially as they relate to boomers: time constraints, lack of promotion, and inadequate volunteer management.

## Time Constraints

*The availability, or lack, of time is still cited as the reason that most people do not participate, or participate more, in volunteer activities.*

— Volunteer Canada (2001)

Increased caregiving responsibilities for grandchildren and parents, additional options for leisure, a busier world, and the economic downturn are barriers to volunteering that many older adults experience. As a result, “[t]his generation will be seeking volunteer opportunities in which they can make a meaningful contribution, in a shorter period of time” (Volunteer Canada 2001). Short-term or project-based volunteer opportunities that are sensitive to volunteers’ time constraints will be necessary in order for volunteer agencies to be successful with the baby boomer segment.



## Lack of Promotion

*The quintessential Baby Boomer advertisement is the beer commercial: short, snappy, creative, alluring. They have been raised to receive information in bite-sized pieces. Whether advertising toothpaste or a volunteer position, remember that medium is the message.*  
— Volunteer Canada (2001)

While the media, government officials, prominent organizations in the field of aging, and others have given attention to the boomers as a group, not enough attention has been given to promoting the individual and communal benefits of the civic engagement of older adults. Targeted promotion of these benefits must occur at the national, regional, and local levels.

Due to its many demonstrable benefits, the positive message of volunteering will be an easy one to promote. A recent study by the University of Michigan (2002) indicates that people who volunteer may strengthen their overall health and longevity. The study found that older people who were helpful to others reduced their risk of dying prematurely by nearly 60 percent as compared to their peers who provided no such support. The societal rewards can also be fiscally measured. In 1998, 15.6 million older adult volunteers gave approximately 2.7 billion hours of time at a value of \$40 billion to nonprofit organizations and causes in this country (Independent Sector 2000). We can expect that these numbers would more than double as the boomers reach their mid 60s, since the population of boomers is more than twice that of today's 65+ population.

Convincing individuals that volunteering is both good for others and themselves is not a difficult task. A recent study found that 84 percent of seniors who were asked to volunteer did so (Independent Sector 2000). There is one important caveat, however: Focusing on a national call to service without simultaneously building the capacity of agencies to place, support, and retain older volunteers could be devastating. And the result potentially worse: hundreds of thousands of volunteers "all dressed up with nowhere to go."

## Inadequate Volunteer Management

As newly retired and transitioning adults begin to explore the role of volunteering in their lives, negative first impressions could undermine the great potential for expanded civic participation in America. Doubling this threat is the fact that boomers are looking not only for increasingly organized and

well-managed volunteer experiences, but also for new and innovative programs that provide camaraderie, learning opportunities, and personal and professional development.

Citing her concern that most agencies don't have the appropriate volunteer management practices in place to absorb more "high-impact" volunteers, Mary Foley of the Volunteer Center of Manassas, Virginia, reports that "[p]lacing older volunteers in meaningful service opportunities is not difficult, but it is time intensive." Designing new volunteer opportunities for older adults and working with the volunteers to set project goals, timelines, and so on will require a high initial investment from agencies. Foley states, "This will require additional resources to promote these programs, train local agencies, and tend to the volunteers and projects."

Potentially the greatest obstacle to civic engagement of the 50+ population, however, is that the articulation of a new vision for later life in America is outpacing the construction of programs and institutions needed to realize this vision. Government, corporations, nonprofits, foundations, and other groups need to work to build the infrastructure to support this vision by:

- Spurring local innovation;
- Replicating effective practices and model programs nationally; and
- Growing the recruitment, training, and support of mature volunteers.

## 7

# Informal Volunteering

**Informal volunteering has gained increased attention in the past decade as individuals and organizations have sought to form new strategies for reaching out to those who choose to give of their time in less structured ways, and to better understand different forms of community involvement that take place in various social, economic, ethnic, racial, and demographic groups.**

The information discussed thus far only pertains to the formal volunteering activities of Americans. It does not include what the Independent Sector and others refer to as informal volunteering. Formal volunteering is more structured in time and activity and takes place by means of an organization, while informal volunteering involves helping individuals (i.e., friends, neighbors, and family members outside of one's household) or organizations on an ad hoc basis. Informal volunteering does not occur through an organized group or for pay (Independent Sector 2001b). In a 1998 study, the top three informal volunteer activities reported were providing emotional support (56.6 percent), helping with household duties (51.7 percent), and assisting with transportation and other special tasks (37.5 percent) (O'Neill and Roberts 2000).

Other figures in this study highlight the significant dynamics of informal volunteering:

- A total of 15.8 billion hours were contributed toward volunteering activities performed through organizations, while 4.1 billion volunteer hours were given through informal volunteering.
- Informal volunteers were less positive in their views concerning organizations than were other types of volunteers and were less trusting of people in general.
- A higher percentage of informal volunteers indicated that they did not attend religious services at all (38 percent) compared to those who volunteered formally (15 percent). Their lower-than-usual rate of religious involvement may partly explain why they have not been approached to volunteer more regularly.

Older adults, according to Volunteer Canada, are often more involved in informal than formal volunteering. Providing needed support to each other, to their extended family, and within their circles of friends, older adults reach out to those individuals to whom they have access, and vice versa. Through these direct acts of giving, older adults are able to see the immediate impact of their efforts, while building and strengthening relationships with those around them.

With boomers less involved in places of worship, formal volunteer organizations must seek to find additional channels to engage this segment of volunteers. Organizations must also try to win over informal volunteers by designing projects that provide camaraderie between fellow volunteers and those they are serving, and by clearly illustrating the fruits of the volunteers' labor.

In partnership with the Annie E. Casey Foundation, the Points of Light Foundation & Volunteer Center National Network found that volunteering is a cultural component of specific segments of American society and that it does not have the same meaning across economic and ethnic groups. For example, to many residents in low-income communities, the terms "volunteering" and "community service" have negative connotations, such as court-ordered community service. To other groups, the terms simply do not resonate culturally. Most immigrant and minority groups have a wealth of traditions and values tied to helping others, but the term "volunteer" does not translate into their familiar concept of service.

To address these additional contexts, organizations must revisit the way they address, define, and promote volunteering. The Points of Light Foundation has found that adopting terms such as "neighboring" and "community involvement" expands the meaning of volunteering to include additional sectors of society (Points of Light Foundation 2000).

Experience Corps is an excellent example of how a program's deeper understanding of informal volunteering can inform strategies for helping traditional volunteer organizations tap the potential of persons generally more likely to be engaged as informal volunteers. Under this school-based program, older adults work one-on-one with young children, create before- and after-school programs, and receive a modest stipend for their service. Not only does this program reach out to an underutilized group of volunteers who wish to give back to their community (generally older, low-income African Americans), but it also helps to address their economic needs.

It is important to note that Experience Corps' success in engaging informal volunteers would not have been possible without federal funding in its pilot and now expansion phases. Its popularity

among older adults illustrates the importance of government-supported inducements that help to attract a broader spectrum and number of volunteers. According to research conducted by Peter D. Hart Research Associates, small incentives could double the older volunteer force in the United States. Hart found that 54 percent of volunteers and 48 percent of nonvolunteers would give at least 15 hours per week if they received modest compensations such as reduced costs on prescription drugs, education credits, and small monthly stipends (Kleyman 2003).

Though gains have been made in terms of better understanding the diversity of forms of volunteer service and how traditional volunteer organizations can tap into this potential, it is important not to make the assumption that every individual and culture can be neatly placed on a spectrum from those who don't volunteer to those who volunteer informally to those who volunteer formally. The concept of volunteering most often referred to by individuals and organizations in this field is indeed a uniquely American construct that does not and should not attempt to encompass the acts of kindness and community building in which other groups take part.

## 8

## Receptivity of Community-Based Agencies to Adapt to Boomer Volunteers

**Some agencies may choose not to create volunteer programs tailored to boomers due to the significant initial investment required. This section will investigate the reasons, as well as the long-term repercussions, of failing to engage this important demographic group.**

It is no surprise that some agencies may choose not to try to engage this segment of the population as volunteers. Overworked staff members have less time to design and develop the types of challenging volunteer opportunities sought by boomers; episodic volunteer activities can be time- and resource-intensive while the results may be only fleeting; the misunderstandings and unrealistic expectations of volunteers without experience in the nonprofit arena may be too great.

With volunteers increasingly searching for dynamic opportunities rather than administrative positions, organizations may have to restructure themselves to fulfill their own mission while simultaneously adjusting to the higher expectations and desires of volunteers. For example, the local Red Cross in Montgomery County, Maryland, found that they could no longer find volunteers to help with administrative duties. But they were able to recruit two qualified volunteers to co-direct an emergency preparedness program. With the \$50,000 that normally would have paid the salary of this full-time position, \$25,000 was used to hire administrative support and the remainder went back to the organization.

The failure of organizations to respond to new trends in volunteerism will not only prevent them from accessing the time and skills of highly motivated and talented volunteers but will also limit their fundraising capabilities. Volunteers have been shown to contribute financially, in some cases

more than double that of nonvolunteers, and are more likely to contribute to an organization in which they are already involved (Independent Sector 2001b). Even planned giving and bequests by boomers could become a heretofore-overlooked resource for volunteer agencies. The report “Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospect for a Golden Age of Philanthropy” estimates the wealth transfer over the next half-century will be between \$41 trillion and \$136 trillion (Clyde 2003).

Even in light of the long-term financial rewards, the short-term costs of creating volunteer programs that meet the needs of boomer volunteers may be too great, particularly given the current economic climate. With limited places for agencies to pursue funding for their existing programs, along with concerns about the sustainability of new initiatives, it is critical that foundations, government, and corporations support not only current community needs but also fund innovative programs that leverage future human and financial resources to address social problems. These challenges illustrate the importance of planning to integrate model programs, effective practices, and general volunteer-management lessons into existing programs and services.

The short-term cost of creating project-limited, high-impact volunteer opportunities that will meet baby boomers’ high expectations are many; but the opportunity cost of failing to do so, in terms of service delivery and financial resources, are far higher. Agencies will need incentives and guidance to create new initiatives that engage boomers, as well as continued technical and financial support to sustain and expand model programs.

## 9

# Concluding Summary

**As boomers move towards the traditional retirement years and the next chapter of their life, they will emerge as a unique cohort placing unprecedented demands on the volunteer sector. With existing infrastructure and capacity, organizations are simply not geared for properly serving the upcoming wave of boomer volunteers. The disparity between these dynamic younger older adults and the inadequate landscape of volunteer opportunities will only grow as the boomers age; without serious action, organizations may not be able to capitalize on the potential of this critical resource.**

Considering that nearly 30 years have been added to the average American's lifespan since 1900 (years that have been added to the "middle" of one's life, not the end) (Ballard and Ballard 2002), it is not surprising that the volunteer sector has struggled to keep up with the increased health and vitality, needs, and expectations of the changing over-50 demographic.

Focus groups and studies by AARP, Peter D. Hart Research Associates, Independent Sector, Temple University's Center for Intergenerational Studies, National Council on the Aging, and many others continue to be applied to better understand what the next wave of retired Americans will seek in a volunteer experience. As a result of this work, nonprofits are aware of the great impact boomer volunteers could have on their organizations and in their communities. Despite this ground-breaking work, a knowledge and resource gap remains that leaves volunteer managers and nonprofit agencies unsure of how to translate this information into substantial programs and initiatives.

To help close this gap, and successfully create new volunteer opportunities and channels for the effective engagement of the diverse group of boomers, questions that must be examined include:

- How do we create large numbers of quality volunteer opportunities that match the interests and the skills of different segments of the boomer population? These include:



- Retiring professionals who seek high-impact volunteering activities where they can use their skills and develop “relationships with a purpose.”
  - Low-income persons who may be drawn into formal volunteer opportunities by stipends, prescription drug discounts, and so forth.
  - Minority groups whose cultural forms of community outreach vary from the traditional American construct of volunteering.
- 
- What is the cost benefit for each market segment?
  - How do we scale up successful programs?
  - How can Volunteer Centers and other volunteer clearinghouses leverage their expertise, resources, and relationships to build the capacity of long-standing community-based organizations to utilize boomers nationwide?
  - How do we motivate and support institutions that traditionally engage large numbers of volunteers to invest in redefining or repackaging volunteer opportunities to cater to this new group of older volunteers?
  - What will it require to increase government, business, and foundation involvement in expanding and strengthening the volunteer infrastructure for older adults?
  - What are the policies and incentives necessary to promote older adult volunteering?

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# Forty-Nine Plus: Shifting Images of Aging in the Media

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# 1 Introduction

“Why don’t we see ads featuring older people wearing cool clothes, driving new cars, buying the latest electronic gadget?” asks Pam Kelly of the *Charlotte Observer* in a 2002 column. Now that boomers are edging towards retirement, there is a demographic near certainty that we will. “The U.S. Baby Boomer Market: From the Beatles to Botox,” an exhaustive proprietary study currently in its third edition, offers a whole section on “Boomers and Automobiles.” Subheadings include “Boomers Developing a Sweet Tooth for ‘Road Candy,’” “Boomers ‘Age’ the Motorcycle Population,” and “Boomer-Geared Cars Will Accommodate Aging” (Infoshop 2003). The adage about being careful of one’s wishes lest they come true might serve well here. While negative stereotypes of frail, penny-pinching retirees have been disincentives to advertisers in the past, a new emphasis on health-conscious boomers with money to spend is no guarantee that their lives will be reflected in positive ways.

The cry for equal time that often dominates discussions of ageism in advertising and entertainment reveals a negative cultural bias about the potential of late life to mean anything in its own terms. The rarely challenged assumption that youth is celebrated at the expense of age is more a feature of the “either/or” model applied to many issues in the United States than evidence of any universal principle. Cross-cultural studies demonstrate that a celebration of youth can coexist quite productively with high respect for the skills, knowledge, and individual attributes of older people. Kinship terms and ritual behaviors codify informal, affectionate relations between young and old in many cultures; at the same time, tensions between both groups and the middle generation are reflected in more formal names and behavioral rules. The anthropological literature on aging offers many relevant examples; see particularly the collections edited by Makoni and Stroeken (2002); Sokolovsky and Shenk (2001); Markson and Hollis-Sawyer (2000); Sokolovsky (1997); Albert and Cattell (1994); and the study by Keith et al. (1994).

In Western societies as well, research does not uniformly support the popular assumption that “youth culture” imagery is linked with animosity towards senior citizens. A 1998 content analysis of British prime-time television conducted for the BBC and the group Age Concern found instead that “40–59 year olds were the least positive and most negative towards older people” (Evers 1998).

Ageism has many causes, but the cumulative effect has been to restrict and impoverish public dialogue about the increasing presence of older people in 21st-century communities. Will they be viewed as mentors with time and experience to share, or as selfish consumers who are draining the legacy of future generations? This paper will examine how entertainment and news media work in association with public policy and marketing concerns to reflect and influence the category “old age” as boomers strain at its boundary.



## 2

## What Kind of Media Issue is Old Age?

The first large-scale study of social aging relied on the notion that nurture balances nature in defining what it means to be old. Working from the Human Relations Area Files to develop a list of more than 100 cultural variables, Leo Simmons reinforced the theoretical assumption that social identities are constructed by a unique confluence of discrete but interrelated factors such as kinship and subsistence patterns, health status and participation in ritual and secular life. His book, *The Role of the Aged in Primitive Society* (1945), came near the midpoint of a century that had been marked until that time by public efforts to define and solidify old age as a fixed biosocial and economic category (Blaikie 1999). After decades of confusion about where elders might fit in a mobile, rapidly urbanizing society, the full outlines of retirement and social welfare blueprints established during the Great Depression were beginning to take shape. As young adults filled the work force and the suburbs after World War II, the guarantee of steady, if modest, retirement incomes paved the way for the Sunbelt migration and for the establishment of the nursing home industry. Ironically, at the moment when social scientists were exploring the idea that biological and social aging were interdependent, widely variable across cultures and, hence, malleable, U.S. society at large was becoming fully socialized to the belief that chronology is destiny. The assumed inevitability of frailty, role loss, and senility, combined with new patterns of age-based residential segregation for elders and young families alike, left few incentives to resist stereotyped images of retirees as frail and disengaged. Robert Butler focused on the negative impact of housing segregation in “Age-ism: Another Form of Bigotry” (1969), an article that is widely credited with introducing the term “ageism” to public consciousness.

Medicare and the community-based programs created under the Older Americans Act of 1965 can be viewed as further responses to the cultural construction of old age as a discrete social category marked by frailty and dependence. Particularly since the 1960s, the federal strategy of limiting social welfare initiatives to “problem” groups such as the elderly and the poor had the unfortunate

effect of confining even well-meaning public dialogue to negative issues. Reviewing presentations of aging on television from a mid-1980s vantage point, Davis and Davis remark that “the usual public affairs special about old people in the community is likely to focus on the visible elderly who have multiple health losses” (1985). Not surprisingly, polls conducted during the 1970s and 1980s found people believing that a majority of elders were or inevitably would be confined to nursing homes, even though the actual number has held steady at about five percent. The U.S. identification of seniors as actually or potentially “unwell” led to a focus on old age as burdensome, rather than to a reexamination of health policies for all citizens. It would be interesting to compare the long-term effect on public opinion of targeting retirees as medically vulnerable with views of health and aging in nations where subsidized health care is considered a basic “need” for citizens of all ages.

The public affairs spotlight on health problems did not hold true for fictional portrayals of aging at the time, nor does it today. With regard to entertainment programming, Davis and Davis cite studies that found “over 90 percent of the older characters were in remarkably good health. It is those characters between ages 22 and 45 who have the most health problems” (1985). The more recent study of British television conducted for the BBC and Age Concern indicates that 50 percent of fictional characters age 60 and older are portrayed as “economically active” and that disability is portrayed in only 2 percent of older people (Evers 1998). Evers notes, “While by and large the under representation of older people may be a matter of concern, the evidence for discriminatory treatment overall is somewhat sparse (1998; see also Blaikie 1999).

Over time, the popular belief in a fixed, nonarbitrary relationship between age and social performance hardened into rigidly calibrated expectations of child development at one end of the life course and abrupt dismissal of productive citizens from the work force at the other. As forced retirement and Social Security made older people a more economically and socially predictable group, negative perceptions were elevated from the level of synecdochic characters in literature and film to gross stereotyping. The advent of television and mass marketing contributed significantly to the promulgation and refinement of negative stereotypes, but studies that place primary blame on the media for generating negative attitudes overlook the very complex interplay of factors that work to stigmatize and marginalize older people. As the founding director of the National Institute on Aging, Robert Butler was uniquely positioned to appreciate the relationship between social policy and public opinion. *Why Survive? Growing Old in America* (1975), his landmark exploration of the psychological and social impact of ageism, received wide public attention and the Pulitzer Prize. For the most part, however, despite extensive domestic and cross-cultural research, social scientists made limited progress in advancing relativist ideas about aging throughout the 1970s and 1980s.

Today there is significant evidence that changing cultural values are combining with the demographic weight of the baby boom generation to force a gradual but profound retreat from conventional, largely negative expectations about both social and physical aging. Sanctions concerning “age-appropriate” hairstyles, dress, demeanor, and recreational behavior have loosened considerably; the trim, smooth-skinned retiree on a racing bike is viewed as an aspirational model, not an oddity. While new options are beneficial, many people will face serious challenges if the healthy/wealthy image supplants other models of successful aging.

Some observers question whether the ability to fight physical aging with hormones, cosmetic procedures, and obsessive exercise will eventually be regarded as a duty, hence reinforcing current biases rather than fostering a new acceptance of the aging process. Postmodern approaches to identity construction are certainly beginning to challenge the notion of “natural” aging. “I am often puzzled when I hear people discussing ‘normal’ ageing or the ‘natural’ ageing process,” Andrew Blaikie writes. “We are all biological creatures, but does age hold much meaning beyond the cultural gloss we paint it with? And if it does, has not science enabled us to manipulate our destinies?... Clearly, aging cannot be reduced to biological processes of decline for, although these affect us all, they occur within a social framework which superimposes a series of cultural codes, symbols, and expectations that vary with the chronological time of the individual life course, historical period, and particular societal setting. Is it more ‘normal’, therefore, to grow old naturally, or, conversely, to conform to convention and attempt to defy or disguise such a process?” (1999).

The postmodern makeover is certainly not confined to physical aging. In a straightforward article on marketing for “generations older than the baby boomers,” Gilmartin (2003) urges attention to “personal growth” and “revitalization.” In an ethnographic study of 26 individuals from pre-retirement through the early retirement years, Savishinsky (2000) documents examples of new civic engagement, creativity, and the blossoming of avocations. The popularity of Elderhostel programs and the opening of public university classrooms to auditors over age 60 are further indicators that today’s retirees remain eager for social and intellectual change.

Self-styled boomer trend guru Ken Dychtwald urges marketplace attention to “five key factors that will reshape supply and demand” for a new generation of retirees. Among them: “A psychological shift from acquiring more material possessions toward a desire to purchase enjoyable and satisfying experiences” (2003). The contents outline for “U.S. Baby Boomer Market: From the Beatles to Botox” notes an appetite for adventure travel; related entries include “Boomers Fuel Growth in Travel Industry” and “Over 50 Travelers Spend More, Stay Longer” (Infoshop 2002). Boomer

interest in second careers, education, and self-actualization movements has already become ubiquitous. In a curious twist on the culture traits model, the marketplace is enabling the leading edge of the baby boom to resist imposed categories and instead continue a lifelong pattern of culturally sanctioned self-creation through individualized consumption of goods, services, and experiences.

While touted as a market opportunity in many quarters, the baby boom has also emerged as a threatening demographic group in discussions of aging. Beyond the obvious issues of cohort size and the resulting strain on health care and Social Security, new issues are beginning to register on the social agenda. Discussions of housing, employment, and consumer spending among aging boomers often emphasize the depletion of resources for younger groups rather than the potential of healthy, well-educated retirees with discretionary incomes to make significant civic contributions. A key question for scholars concerned with the cultural construction of aging is whether boomers truly will break free of existing stereotypes, as many predict, or ultimately reinforce them. Answers will depend on the same infrastructural mix of social policy, economic reality, and public opinion that has generated popular stereotypes about today's elders. The following sections of this paper will address the ever-shifting interplay between the socioeconomic status of older people and images of aging in entertainment, advertising, and news media.

## 3

## Images of Aging in Entertainment and Advertising

The long-term effects of targeting retirees as physically, socially, and economically devalued are well documented in advertising and entertainment programming for the 1970s and early 1980s. Useful reviews of this literature are offered by Signorielli (1999); Tupper (1995); Gerbner (1993); Woolf (1998); Davis and Davis (1985); and Gerbner et al. (1980), among others. Studies of media and aging published in professional journals during the 1970s established at least one general finding that remains consistent today: Older people are greatly underrepresented in broadcast media. Aronoff (1974) found 4.9 percent elders in a prime-time sample of 2,741 television characters; Northcott (1975) found only 1.5 percent in a sample of 464. Aronoff and Northcott both concluded that negative messages were associated with a majority of the older characters who did surface on prime time television (see also Gerbner et al. 1980).

Content analyses published during the most recent 20-year period have consistently reinforced the findings that people over age 60 or 65 are grossly underrepresented and that the problem is notably worse for female characters, who may be cast in “senior” roles at much earlier ages than male characters (Signorielli 1999; Gerbner 1993). Reviewing data on television dramas and commercials that reflect trends into the late 1980s, Gerbner notes that “age is a stable and strong determinant of who appears most and gains or loses most in the world of network television drama. In contrast to the distribution of age groups in the American population, the television curve demonstrates a pronounced central tendency; it bulges in the middle years and under-represents both young and old people...Those sixty-five and over, comprising almost 12 percent of the U.S. population, made up less than 3 percent of the fictional television population. Commercials tend to further exaggerate these inequities” (1993).

While the numbers remain very low, reports about the images associated with elderly characters began to shift markedly in the mid-1980s. Austin (1985) tested the cultural climate with a study of 144 college students; she found that attitudes towards old age were more positive than those found by previous researchers. By 1988, Dail was reporting favorable portrayals of older people in her sample of 12 prime-time, “family-oriented” programs. Citing Van Selm, Westerhoff, and Thissen (1996), Evers points to an important mid-1980s change in how age categories are popularly defined: “retired 65-plus” becomes “older 55-plus” (1998).

This shift reflects several trends, including the corporate strategy of offering early-retirement incentives and the much-publicized displacement of older executives by consolidations and takeovers. Popular media began to devote attention to the mid-life male; cosmetic procedures gained new acceptance for men in pursuit of second careers. At the same time, employed middle-aged people were at the peak of their earning power; some were benefiting also from the generational transfer of resources through inheritance. Housing values rose in some regions, boosting equity for mid-life homeowners and foreshadowing the nationwide escalation of equity experienced by boomers today. Affluent and middle-class folk over age 55 were actively courted by retirement communities, which offered an aspirational model of late life based entirely on private entitlement. The symbolic vehicles for marketing this new “wanna be” cluster were images of white, athletic, heterosexual couples of indeterminate age enjoying active lifestyles in the safety of gated environments (Vesperi 2001; see also Low 2001).

Overall, content analyses conducted from the mid-1970s to the early 1990s provide a chronological record of televised images of aging that roughly parallels a significant restructuring of public and private expectations. The Reagan-Bush era heralded an ongoing shift away from the emphasis on aging as a social welfare problem and toward a focus on healthy, active seniors with stock portfolios and independent lifestyles. “I do not want my children to grow up in an isolated neighborhood, knowing neither the realities of old age nor the meaning of racial heterogeneity,” wrote Butler in 1969. Age-segregated housing, then the refuge of the elderly poor, was now touted as an upscale choice for healthy retirees who could buy “freedom” from familial and civic ties. This reconstruction of what it means to be old conflicted sharply with traditional images of both the frail, disengaged old codgers and the benign elders who retained roles and responsibilities within the family. *Going in Style*, a 1979 film featuring George Burns, Art Carney, and Lee Strasberg as crotchety criminals, is an early cautionary tale about the foibles of self-serving old folk. The drama is played out more subtly in the 1985 film *Cocoon*, in which seniors in a retirement community are forced to choose between long-standing social ties and the promise of restored health and vigor.

By the mid-1990s, aging had moved beyond the academic arena to become an issue of concern for media and advertising professionals. Sponsors for a 1995 conference on "Images of Aging" held at the University of California Los Angeles included CBS and the Academy of Television Arts and Sciences. That same year, the leading edge of the boomer wave moved to the brink of the "golden demographic," television viewers who are 18–49. Marketing experts spread the word: The future of discretionary spending would be controlled by older, healthier, more demanding consumers who were already sensitive to stereotypes and prepared to resist them. Reports of negative portrayals declined as images of older people were decoupled from stereotypical settings and products. Research from this era suggests that advertisers were beginning to see age-related topics as dangerous ground.

Defining "elderly" as individuals who appeared to be 65 years of age and older and "adults" as 18–64, Tupper (1995) produced a content analysis of 278 commercial spots aired on FOX, CBS, NBC, and ABC during 60 prime-time hours in November 1994. She found that 15 percent of the 278 spots included elderly people. "Of the 42 commercials with elderly characters, 15 featured the elders alone, 21 showed elderly characters with adults and youth, and only 6 showed elders interacting directly with youth minus any adult characters." Male characters were overrepresented in her sample (39 versus 29 female characters); both men and women were grossly underrepresented in proportion to their presence in the U.S. population. Ethnic diversity was almost nonexistent in Tupper's sample. Only 1 of the 68 elderly characters was African American, 1 was assumed to be "Hispanic," and 2 others were coded as "visible minority." The lack of diversity is consistent with research on magazine advertising (de Luce 2001; Bramlett-Solomon and Wilson 1989; see also Kilbourne 1999).

Tupper's findings are particularly interesting with regard to the settings in which older characters appeared. Forty percent of the ads featured elders in professional/corporate/retail settings; only two percent depicted them in health care settings. There was no significant association of aged consumers with frailty. Instead, Tupper notes, television advertising would suggest "the predominant health concerns facing elderly consumers are malnutrition, headaches and colds." She found more sins of omission than anything else: "No clear cut, definitive negative stereotypes of elderly people emerged from this study; in fact, elderly characters did not appear in the anticipated commercial categories...roles for products such as arthritis medication, denture care products, or skin wrinkle creams, nor did they appear in sick, weak, fragile, or absent-minded roles."

Tupper concludes, “Advertisers may have taken the cue from published research and made an obvious effort to avoid perpetuating the sick, weak old person stereotype. However, the effect of this has been to reduce the overall opportunities for visibility of elderly characters.” While her work on the representation of elderly people in prime-time advertising does not support common assumptions about age-stereotyped products, it does strongly suggest that advertisers have simply sidestepped the challenge of developing age-integrated marketing campaigns.

In another sample from 1994, Roy and Harwood (1997) analyzed 778 commercials looking for “older adult characters,” this time defined as individuals 60 and older. Their viewing time was 5:30 to 10:30 p.m., a deviation from the 8:00 to 11:00 p.m. prime-time viewing window that is typically cited. The difference is potentially significant because their sample encompassed the evening news hours, when older audiences are particularly loyal. Like Tupper, however, they found that older adult males were underrepresented and that the lack of representation was particularly striking for women and minorities. Signorielli found that “minority characters on television tended to be cast in younger roles than whites” during the 1990s (2001).

Bell (1992) studied prime-time programming during the 1989 season, focusing on five shows that featured older characters in major roles (*In the Heat of the Night*; *Jake and the Fatman*; *Matlock*; *Murder, She Wrote*; and *The Golden Girls*). She concluded that the images of aging presented by these leading characters were positive ones. Signorielli’s 1999 study of three decades of television programming reveals that the number of elderly characters has remained at a constant low of three percent for prime-time drama. The percentages of older characters in all recent studies remain very small, despite fewer reports of negative stereotyping in the imagery itself.

What this broad range of findings means is another matter. At times it is difficult to pinpoint where change has been most significant—in the messages offered by mass media or in the theoretical perspectives of those reporting the data. Consider Woolf’s (1998) commentary on Elliot’s (1984) sample of senior characters in daytime soap operas: “On the whole, older males were characterized as good listeners and females were characterized as nurturers. This supports Ramsdell’s (1973) description of daytime serial older adults as, ‘valued advisors-in-residence with the children and grandchildren’. Thus, while the depiction of the older adult in daytime television is not primarily negative, it is stereotypic.” Ramsdell’s piece, “The Trauma of TV’s Troubled Soap Families,” appeared in the journal *Family Coordinator*, suggesting that one analyst’s “valued advisor” might be another’s ageist stereotype. An eye-of-the-beholder problem inherent in this literature makes it difficult to summarize. Few would argue, for instance, that the Wicked Witch of the West in



*The Wizard of Oz* and the dog-hating, older neighbor who sparks Dorothy's dream construction of her are negative images of older women, but should Auntie Em—a stereotyped “nurturer”—be condemned as well?

Efforts to parallel media figures with figures from literature or mythology abound, and much of the discussion has focused on older women. These are interesting intellectual exercises but not always indicative of how contemporary characters have been developed or received. In contrast to the Wicked Witch, Blaikie offers Mae West, whose film presence began at 40 and “whom age did not wither or desexualize” (1999). His admiration is qualified, however, by the inclusion of this “telling point” from Angela Carter's discussion of West as “...the middle-aged woman, whose literary prototype is the nurse in *Romeo and Juliet*, [who] may say what she pleases, wink at and nudge whomever she desires but we know it is all a joke upon her, for she is licensed to be free because she is so old and ugly that no one will have her” (Carter 1979, qtd. in Blaikie 1999). Setting aside the more recent precedents for West's persona offered by American history, it is simply not true that no one would have her. *Complicated Women*, a documentary about how government censorship in the 1930s stifled the expression of sexuality by women on screen, suggests that some viewers, at least, took West's famous invitation all too seriously (Timeline Films 2003; see also LaSalle 2000).

Some mid-20th-century cinematic portrayals did offer unabashedly negative commentaries on older women. Brooks isolates the trio of *Sunset Boulevard*, *What Ever Happened to Baby Jane*, and *All About Eve* as films that “narrate the passing of the old Hollywood through this figure of the aging actress” in the 1950s and 1960s (Brooks 1999). Sensuality returns when Ruth Gordon is desired by an adolescent Bud Cort in *Harold and Maude*, a dark comedy from 1971 that highlights the absurdity of ageism, narcissism, and a range of social conventions in the face of our inevitable mortality. Gordon's character has been roundly critiqued, however, along with the female leads in *On Golden Pond* (too solicitous), *Driving Miss Daisy* (too imperious), and *Trip to Bountiful* (too frail) (see Markson and Taylor 1993 in Blaikie 1999 for discussion of these three films).

The television series *The Golden Girls* is an interesting example of efforts to bridge the conflict between traditional family roles and the older person's emerging claim to a postmodern refashioning of social and sexual identity. While some might argue that the image of the socially and financially independent older person reflects a more positive construction of aging, it could be viewed also as a new but equally destructive stereotype (see Gerbner 1993). Davis and Davis (1985) are reluctant to accept the presence of active, vigorous characters at face value; they cite Kubey's (1980) work on reverse stereotyping to raise the possibility that positive images of aging are being exploited

for “exotic” or humorous ends, further distorting the overall representation. Analysts are nearly united in disparaging the presence of elders in situation comedies; the positive attributes of humor are rarely mentioned. Many researchers are heavily invested in the content analysis method; self-reflection is uncommon when it comes to the construction of categories or the application of analytical models. Therefore, it is both refreshing and significant that Tupper (1995) notes “the difficulty of establishing objective criteria by which to judge negative, neutral and positive representations” (see also Davis and Davis 1985).

Woolf’s review of the literature on aging in the media lead her to conclude cautiously: “television has tended to present an unrealistic picture of the older adult” (1998). She stresses that the studies are contradictory, however, and she notes that unrealistic representations “may not necessarily result in the adoption of ageist attitudes by viewers. Passeth and Cook (1985), for example, propose that television viewing has a small impact on knowledge of and attitudes about aging, and effects are primarily restricted to younger people” (1998). Researchers are quite radically divided about the impact of popular imagery on children and on older people themselves. In a separate critique, Woolf points to several methodological flaws that make the work contradictory and confusing, such as a “mono-method bias,” foregrounding age as a topic in subjects’ minds, and relying solely on younger subjects (Woolf 2003).

Another problem is the propensity to regard correlation as cause and effect, particularly when media sources can conveniently be held harmful. For instance, in a recent long-term study of self-image among older people, published in the *Journal of Personality and Social Psychology*, researchers found a strong correlation between positive self-perceptions and longevity (Levy et al. 2002). Testimony on the study before a Senate Special Committee on Aging contributed to news leads such as this one from the *Holland Sentinel*: “Television ads depicting aging baby boomers as ‘greedy geezers’ and news stories calling older audiences ‘a bad omen for advertising revenues’ pose serious risks for the elderly and may even shorten life span, a panel of experts on aging testified Wednesday” (*Holland Sentinel* 2002). Becca Levy, a Yale University epidemiologist who coauthored the journal article, gave Senate testimony on the topic. She explained that “although the prevalence of negative images of aging is not entirely due to the media and marketing, they seem to be the sources that are the most pervasive, identifiable, systematic, and profit-driven. Extolling youth while demeaning the old helps to generate images that, as our research suggests, may have devastating consequences” (Senate Special Committee on Aging 2002). Levy’s study did not actually include observation of television viewing habits, however.

“Seem to” and “may” are operative terms here. Ethnographic studies of late life show that self-image is fashioned from many, diverse elements. While older people are certainly sensitive to cultural expectations, contacts with family and friends are key in constructing a positive sense of self. In a small but closely observed sample of Maine elders in a rural setting, Rosel found that her research subjects were active agents in constructing their own identities, not hapless victims of media stereotypes. While many lived alone without transportation, they drew strength and support from ongoing social networks and expressed pride in their unique local knowledge. Rosel suggests that “media images...have stiff competition for the attention of individuals so thoroughly attentive to the everyday world around them. Of course, these elders take note of images of older people in the media, especially if there is a local frame of reference or familiar landscape. But real people, known age peers, provide the important models for identification when it comes to aging (or surviving) in place” (2001). Working with a very different sample of elders “aging in place” in New York City, Freidenberg (2000) found health, social connections, income concerns, and safety to be central in defining the meaning of old age for her informants. While she did not address media, she noted that older people in “El Barrio” were attentive to public policies that influenced their lives, particularly in these four areas. Neuman, Just, and Crigler (1992) found that news consumers in general were active participants in framing political information. “It soon becomes clear that in their active interpretation of the political world, audience members alternatively accept, ignore, and reinterpret the dominant frames offered by the media” (Neuman, Just, and Crigler 1992 in Campbell 2000).

A review of recent literature leads Bradley and Longino (2001) to suggest that older people do not relate positively to product categories that reflect their chronological ages (see Gunter 1998). These authors raise the idea that simply increasing the representation of older people in advertising (older models, or even older role models) might not have the intended effect. They point to marketing strategies that urge advertisers to use models 10 to 15 years younger than the target audience because some researchers suggest that “many elders, especially those who are healthy and active, perceive themselves to be 75 to 80 percent of their actual chronological age” (2001). Bradley and Longino also identify several surveys (Shavitt, Lowery and Haefner 1998; Mochis 1994; Speer 1993) that found older people actively dissatisfied with marketing efforts. In one study, almost one-third of respondents over age 55 reported boycotting products because of perceived age or youth stereotyping. “Mochis also found evidence to suggest that the percentage taking offense at age stereotypes may be especially high among people age 65 to 74 and among those who are healthy, wealthy and active—that is, among those in the prime senior target market” (Bradley and Longino 2001).

If current retirees do not really conform to the stereotype that they are passive consumers of mass communication, it is reasonable to assume that aging boomers will display even more agency in the information and entertainment marketplace. What will happen when a majority of boomers—not just the leading edge—exceed the boundaries of the traditionally targeted 18–49 marketing category? Ken Dychtwald predicts that demography “will shift the ‘epi-center’ of consumer activity from an exclusive focus on youth, to the need[s], challenges and aspirations of middle-aged or mature consumers” (2003).

A 2002 press release from Corbis, a proprietary-image giant that maintains an inventory of some 65 million pictures, demonstrates that a move to “shift the epicenter” is already well underway. The release advertises Corbis’s “46/64” image catalogue, a marketing tool that “places older Americans in the commercial picture.” How? “Filled with rich, compelling photography, 46/64 captures 38- to 56-year-olds in fresh and unexpected settings and styles while celebrating the essence of this unique group. Divided into the sections ‘Mind,’ ‘Body,’ ‘Heart’ and ‘Soul,’ the pictures in 46/64 help creative professionals find the right image for their needs, and to express their vision” (Corbis 2002). The photos offered for sale are said to reflect market-researched “trends and topics” that in turn reflect the “values” of boomers. For example, “[t]he new reality of graceful aging with a youthful, energetic look” is said to reflect the finding that “[t]his group is still working, learning and active.” The catalogue “portrays...individualism, personality, confidence and rebellion,” reflecting the idea that boomers “break the rules, question tradition and authority.” While these associations are at least as clichéd as the ones they promise to replace, a third observation may be worth noting: “This group was the first to move from their hometowns, change their social class and challenge aging. 46/64 addresses these milestones with imagery of intelligent people redefining concepts like beauty, aging, success and freedom.” Leinweber (2001) describes how the process of pairing images with “key values” is also being promoted for the “older adult market.”

Advertisers may be stocking up on “meaningful” images of mature adults, but their presence in the media market remains negligible. Judith de Luce cast a wide net in 2001 with a content survey of attention to consumers ages 50 and older in advertising and articles from 31 popular magazines. De Luce studied news magazines such as *TIME*, mainstream magazines including *Vogue* and *Woman’s Day*, and a strong sample of publications aimed at specific readers, such as *Ebony*, *Latin Style*, *Out*, and *Native Peoples Arts and Lifeways*. De Luce found four substantive articles that addressed aging, including a fashion spread in *Vogue*. However, with the exception of *Prevention*, a health magazine, and the two business-oriented publications *Forbes* and *FORTUNE*, which

featured older white men, models over the age of 50 did not have significant presence in the magazines' ads. De Luce wrote, "If we were to draw a picture of American life exclusively from evidence derived from these thirty-one magazines, we would have to conclude that the consuming population consists primarily of people 18 to 49 years old. We would also have to conclude that there are almost no people of color in the United States" (2001).

More than three decades of research on all aspects of media and aging have generated many hypotheses but no unified evidence of a simple, cause-and-effect link between televised or print imagery and attitudes about old age. Again, what does seem consistent is the relative absence of older characters in both programming and advertising, with white males the most visible and minority elders the least. The effects of this invisibility have unquestionably been damaging. As George Gerbner eloquently puts it: "Representation is, of course, not just a question of numbers or of fidelity to census figures. It is a question of the variety of roles, opportunities, life chances, and images most people see in common from infancy on and as they grow old. Those underrepresented in the world of television are necessarily more stereotyped and limited. Visibility is privilege in the symbolic world" (1993).

The aging of the diverse and yet highly self-conscious baby boom generation offers new opportunities to fill this symbolic void. Boomers are the first generation to take television for granted; their realities have always been "mediated." Life experience and exposure to "aspirational cluster" marketing could further accelerate the ongoing identity-construction process among people who have reached age 49 with the unchallenged expectation that most commercial programming will be aimed at them. As Bradley and Longino point out, "Old age is a moving target" (2001).

## 4

## Print and Broadcast News Media

Despite the enormous literature on journalism, studies of aging in both print and broadcast news are relatively sparse when compared with work on entertainment or advertising. Some findings are similar, particularly the underrepresentation of people in the 65 and older category (Evers 1998). Evers' discussion of a random survey of newspapers and magazines in Europe for 1996 could have been applied in full to coverage in U.S. newspapers a decade earlier:

*The image of older people in newspapers and magazines is very one-sided...older people seem to be considered as a problem group in society and an expense. Popular issues in print media include the dismissal of older employees, loneliness and the objectionable consequences of "grey pressure." Disproportionate attention is paid to extreme and eccentric issues such as older gamblers and older people lying dead for weeks in their apartment. On the other hand, little attention is paid to older people's contribution to informal care and volunteer work (1998).*

A study of the topic in the United Kingdom for the UN International Year of Older Persons, 1999, found that older people and their issues were not neglected, although stories still focused on frailty and victimization (cited in Bergstrom 2002).

All of these topics are still prevalent in U.S. newspapers. However, they have been tempered by a public policy shift that deemphasizes social welfare issues—even in the face of continuing need—and by the growth of the "aging beat" as a journalism specialty. As mentioned previously, the high levels of public outrage and government receptivity to change that led to Medicare, Medicaid and community-based services were unfortunately paired with a perception of the elderly as frail victims. In the current climate of decentralization and privatization, retirees are perceived as less needy and more greedy (see Torres-Gil 1991). Danish journalist Hans Bergstrom put it well when he linked the problem to "a media tendency of living in a symbiotic relationship with political

actors framing a problem in familiar terms, as well as variations on the more general ‘feel good’ factor in society” (2002). Looking at print and broadcast news coverage of health care policy for the years 1997–2000, researchers for the Kaiser Family Foundation found that coverage of issues deemed relevant to the elderly rose in relation to the upcoming presidential election. “Seniors vote in large numbers, so the candidates talked a lot about the health issues seniors care about most. And when they did, the news media covered the story.” And further: “That the changes in the topics covered seemed to so closely follow what was in the spotlight in the Congress and in election campaigns suggests that, when it comes to health policy, the news media was more likely to be “following” than “leading” the national agenda” (Kaiser Family Foundation 2002).

Official pronouncements and “expert” knowledge frame and inform news coverage, often signaling the difference between “serious” and “sensational.” For example, demographic pronouncements on the graying of the population are serious news, while social scientific studies about late life engagement are often regarded as fodder for quirky features at best. Acutely aware that inadequate or novel framing can overwhelm credible content, journalists are often reluctant to stray from the familiar. Addressing the topic of frames in an article on writing and reporting, veteran journalist Cole Campbell sounds much like an anthropologist discussing ethnocentrism: “The biggest frames—worldviews, belief systems, personal definitions of ‘THE Truth’—can be so pervasive and persuasive that everything you encounter you see through that frame. That makes it hard to consider other frames of reference, other ‘Truths’” (2000). Campbell points out that “[f]rames are sometimes as simple as metaphors, sometimes as complex as analogies.” Telling a new story about aging requires new metaphors, and that can be risky business.

Writing on the topic of “geezer-bashing” for the web-based publication *Extra!* in 1991, John Hess sounded an early alarm about the media’s tendency to blame old folks and their entitlements for everything from infant malnutrition to the Savings and Loan crisis. Labeling such claims “propaganda,” Hess responded with a tried and true reporting strategy: Point to the holes in the argument and then let accurate statistics speak for themselves.

“Age beat” reporters are active reframers, and their specialty is becoming a respected assignment in 21st-century news organizations. Paul Kleyman of the American Society on Aging notes that more than 700 U.S. and Canadian journalists representing a range of media belong to the Journalists Exchange on Aging, an information network designed to help those who cover this area as a regular beat or in frequent assignments (Kleyman 2002, 2001a). According to editorial writer Mary Ellen Schoonmaker, some 50 U.S. newspapers support aging as a specialization. Schoonmaker

highlighted the topic in “A Beat Comes of Age,” an article for the *Columbia Journalism Review*. She promotes the age beat as a wide-ranging assignment that offers freedom to transcend traditional departmental slots in news, features, business, and sports. More important, the beat is a substantive one: “reporters are covering not just people of a certain age, but a historic change, as the U.S. population ages as never before. The baby boomers, one of whom turns fifty every seven seconds, will be the largest single generation of older people in history. The age-beat audience is not only older people, but also middle-aged readers who are caring for their parents and starting to think about the last part of their own lives” (2001).

Bill Krueger, an investigative reporter for the Raleigh, North Carolina, *News and Observer*, became interested in the topic of aging while doing a series of articles on nursing homes. Krueger compares aging to newspaper coverage of diversity, where a decade of heightened sensitivity has “changed the face of many newsrooms, and has changed the types of stories that appear in the newspaper.” Not so for the elderly, he says. Coverage of aging issues “runs the risk of reducing our older population to caricatures” and fails to provide older and middle-aged readers with “timely and useful information” (2001). Krueger finds hope in resources such as the New York-based International Longevity Center—USA. An increasingly influential research and policy institute founded by Robert Butler, the Center counts “highlighting older people’s contributions to their families and to society as a whole” as part of its mission (for more information about the Center, see [www.ilcusa.org](http://www.ilcusa.org)). With support from the John S. and James L. Knight Foundation, the Center has offered a series of programs for journalists on “Covering the Longevity Revolution.”

In “Get Ready for the Graying of the Baby Boomers,” a recent article for *Editor and Publisher*, Charles Bowen (2003) offers a peppy sales pitch for coverage of aging: “Smart newsrooms are preparing now by finding resources to cover the story that will dominate much of this new century; the world’s aging population. Add to your online toolbelt a new site from the American Federation for Aging Research. Infoaging.org promises to deliver the latest research-based information on a wide range of age-related diseases, conditions, and issues.” Seemingly without irony, Bowen recites a litany of “age-related” topics, mostly medical.

While more reporters are becoming interested, perspectives on aging are far from unified within the news industry; many executives resist aiming resources at older or even mid-life consumers. Recent studies document a clear and growing imbalance between the goals of veteran reporters and the management strategies favored by some media executives (Bergstrom 2002). Reporters see opportunity in the “age wave”; executives fear disaster. Both groups base their predictions on



trade studies that definitively document the graying of the newspaper-reading public. Richard Somerville (2001) offers a concise summary of research by the Readership Institute, a respected source in this field. He points also to relevant work in Smith and Reinhard's *The Changing Reader: Understanding the Forces Changing Newspapers* (1997).

The issue in a nutshell: The newspaper reading habit is most deeply ingrained in people who were old enough to track the movement of troops through print coverage during World War II. Yet, current studies indicate that newspaper readers in their 70s—folks who were adolescents in the 1940s—may be turning to television due to eyesight problems. Middle-aged boomers and the “young-old,” readers who collectively span the ages of about 45–74, are most loyal to mainstream newspapers. They are also most willing to read a paper from front to back, browsing through a wide range of content for items of interest. The younger the reader, the more likely he or she is to be impatient with general-interest publications of all kinds. Specialty magazines and Internet sources deliver the goods to young consumers who are fully socialized to niche marketing. Young adults are also comfortable with vertical learning, hunting isolated information in a chain rather than browsing until something catches their eye.

The “buzz” is that young readers’ lifelong media exposure favors sound bites over long narratives, concedes Michael Scherer (2002), a *Columbia Journalism Review* editor. In a balanced treatment of research on trends in magazine reading, Scherer calls into question numerous assumptions that are driving media redesigns aimed at youth, including the belief that young people have short attention spans. Some decision makers, he says, are “struggling to refocus the terms of the debate and dispel myths, lest advertisers and readers start to believe them” (2002).

It is critically important to look beyond the familiar assumptions that ageism is simply image-driven, that “the media” promote “youth culture” in ways that universally demean and demoralize older people. The highly competitive environment of the information age is driving news executives to make active, conscious decisions about whether to spend money on keeping loyal audiences or on reaching out to new ones. For the most part, they see financial crisis ahead unless newspapers can be rendered necessary in the lives of young adults. The trend has been to accomplish this goal by making newspapers bright and shiny, with more graphics, shorter stories and, some say, an effort to purge the newsroom of middle-aged reporters.

Comparable trends can be identified for television. Older viewers are likely to accept established television news formats and to organize their time around watching a program, rather than requiring

information and programming to be available on demand. The Internet is structured to provide this; traditional prime-time news broadcasts are not.

"The most classic example of an aggressive campaign to bring in younger viewers is the revamped CNN Headline News," former ABC producer Callie Crossley explains in a 2001 interview for the journal of the American Society on Aging, *Generations*. "That was a redesign hoping to appeal to a direct demographic...Other people complain, 'I can't watch it; I can't read it.' Baby boomers are complaining about this. You've got a really loyal [news] audience...If you keep crowding them out, they're gone. Particularly in an era of niched programming, allowing them to go elsewhere along cable."

Where older viewers land on the dial is not a driving concern, says Crossley, who spent 13 years with the television news magazine *20-20*. "Advertisers want the ones who can buy the high-end product. The golden demographic has always been 18 to 49, even though the baby boomers are economically powerful" (Vesperi 2001).

"Newscasts tend to attract older audiences, a serious deficiency in an industry dedicated to the single-minded pursuit of the young adults advertisers prize most," explains Lawrence K. Grossman in the January/February 1998 issue of *Columbia Journalism Review*. Grossman, a former president of NBC News and PBS, blames the "news fluff" that has replaced serious documentaries on a misguided quest for the youth market. The reason: Television advertisers pay well over twice as much to reach viewers in the 18–35 demographic than for those over age 35. He notes a "lightening" of newscast content: "playing down serious reporting about government, international affairs, and major public issues, whose appeal is thought to be confined largely to older viewers."

Indeed, during a six-week period studied in 1997, the Project for Excellence in Journalism found that "[o]nly eight percent of the stories on the prime time news magazines concern the combined areas of education, economics, foreign affairs, the military, national security, politics or social welfare issues" (Project for Excellence in Journalism 1998). Why? According to Project researchers, "these programs are set against prime time entertainment programming, and often are aimed at audiences that do not watch network news" (1998; see Kovach and Rosenstiel 2001 for updated discussion of declining coverage in news magazines).

Newspapers did better. During the same time period, Project researchers found that newspapers devoted 59 percent of front-page coverage to government, foreign affairs, legal issues, and social welfare (1998). It is not likely, however, that this spotlight on serious news reflects an effort to

capture or even hold the interest of aging readers. It may be a reflection of newsrooms themselves, where older reporters are attempting to hold firm to traditional journalistic values despite corporate pressure. The 2002 American Journalist Survey, based on extended telephone interviews with 1,149 workers in broadcast, print, and wire service media, found that 70.5 percent of journalists rate the government “watchdog” role “extremely important,” a small increase over 1992. The same survey shows an overall increase in the average age of journalists from 36 to 41 between 1992 and 2002. “Compared to the 2000 U.S. civilian labor force, journalists in 2002 are considerably less likely to be younger than 24 years of age...more likely to be 45 to 54,” researchers found (American Journalist Survey 2003).

Print and broadcast executives don't have to fight for the middle-aged; like older consumers, they are already a bird in the hand. Boomers constitute more than 50 percent of newspaper readership in some markets, and they watch the most television, too. Marketing research by the NPD Group found that 45- to 65-year-olds spent 19 more minutes per day engaged in reading than people in the 24- to 40-year-old group. “While younger twenty-somethings spent an average of only 24 minutes per day reading, Americans over age 50 clocked nearly twice as much time per day on that activity,” NPD marketers summarized. “This trend, coupled with shifting demographics as Boomers enter middle age, could mean a windfall for publishers” (NPD Group 1999).

Yet, even when boomers are acknowledged for their collective purchasing power, there are worries about how much time they count as leisure and how they plan to spend it. Some trend watchers fret that the upswing in second-home purchases and travel will prompt boomers to ignore the ad-heavy Sunday paper or cancel it altogether. Writing for *Editor and Publisher*, Lucia Moses cites this dire warning from demographer Peter Francese: “That 55- to 65-year olds will be the fastest growing age group in the next four years sounds good because they're also among the biggest spenders on newspapers. But they're also the most likely to own second homes where they will spend more weekends out of reach of their hometown paper” (Moses 2003).

In a much-discussed study based on interviews with 200 news executives at the turn of the millennium, Nancy Hicks Maynard targets middle-aged management as an obstacle to reaching that coveted younger consumer. Her executive summary of the report minces no words: “Baby boomers have captured the newsrooms of traditional media, especially print media. These newsroom leaders disdain the learning styles and information-getting habits of younger people. They lack appreciation for a future, growing audience” (Maynard 2003; see Maynard 2000).

The fastest-growing audience is not the young, however, a fact that many media executives seem eager to ignore. Paul Kleyman of *Aging Today*, who is widely regarded as the leading journalist on the U.S. age beat, responded to Maynard's work with a warning about ageist assumptions in the newsroom. He urged decisionmakers to revisit outmoded marketing strategies, citing a 1995 proprietary study that found "ageism was a secondary effect of the industry-wide practice of estimating numbers of household units, especially those in which young, June Cleaver-type mothers make family buying decisions, rather than calculating audience size and buying power by per capita income." Such a reemphasis, Kleyman explains, would "place a spotlight on today's more affluent older audiences, but force advertising agencies to abandon the household unit" (2001b).

The model offered in Hans Bergstrom's recent study, "Age in the Press" (Bergstrom 2002), could be applied productively to an analysis of all media industries that rely on advertising revenues. Editor-in-Chief of *Dagens Nyheter*, a major Danish daily, Bergstrom held a resident fellowship at Harvard University's Joan Shorenstein Center on the Press, Politics and Public Policy during Spring 2001. He compared both the coverage of age-related issues and the newsroom as a work environment for middle-aged journalists at several newspapers, with primary focus on his own employer and the *Boston Globe*. Both the *Globe* and *Dagens Nyheter* lost circulation during the period 1995–2000. Against the backdrop of demographic change, which, he notes, "may be the single most important transformation of our time," Bergstrom examined newspapers as "organizations," as "markets," and as "agenda setters" (2002). Organizationally, he found, newspapers face a crisis similar to the nursing profession, in which an estimated nine percent of nurses were under 30 years of age in the year 2000. As early as 1998, only three percent of newspaper reporters in the U.S. were under age 25.

Like Maynard, Bergstrom notes: "The editorial leadership at the *Globe* is dominated by 'baby boomers' in the same narrow age range" (2002). And, like Maynard, he finds criticism of their leadership style, but not because they are letting young readers get away. Instead, he suggests that executives have been guilty of ignoring the most attentive market with the most money to spend. Among his most interesting conclusions:

- "In their internal organization, the main objective has been to dispose of upper-middle-age employees, irrespective of their expertise, in order to be able to recruit younger people."
- "In their market strategies, focus has been on meeting threats from the Web and from new generations. Core readers in their middlescence have been taken for granted and viewed as not worth paying attention to."

Their dramatic increase in numbers as readers in the coming years, and what those numbers mean for the character of journalism in possible weekend events supplements, has not been considered at all.”

- As for media attention to aging issues, “changes emanating from the demographic transformation have made a certain inroad, but on the whole, not as a result of conscious initiatives from the top.”
- “The absence of initiatives seems to be related to other obsessions: to reach the young; to attract the early career people in high tech; to secure threatened advertising markets; and to be better anchored in certain geographical areas” (2002).

Bergstrom’s findings are clearly related to trends in broadcast journalism, entertainment media, and advertising. If boomers are shaping the media agenda, they are clearly responsible for stereotyping—or outright avoiding—the portrayal of age. The question of who will shape the image of their own social aging is highly significant for the future.

## 5

## Overview of Approaches to Age-Related Issues in Contemporary Media

Three basic approaches to the delivery of images and information about aging mark traditional formats in television and print media: age segregation, age objectification, and age integration (see Vesperi 1994). The most pedestrian examples of age segregation are the “age pages” or specialty sections found in newspapers and “senior spots” or public service announcements on television. These devote most of their coverage to health, finances, exercise, and predictable features that usually focus on “coping” with something. The age page or broadcast segment usually has a signature format and logo (plus music in the case of television) that signal non-elderly consumers to tune out or turn the page.

Age-specific magazines such as *AARP The Magazine* and *New Choices*, a discontinued offering from Reader's Digest, are free-standing vehicles aimed at older markets. In recent years, AARP has refined its marketing to target several subgroups of older readers with different publications. The design and presentation of general interest, age-segregated magazines are as sophisticated as publications aimed specifically at youth and other demographic niches. Some “seniors” publications are unabashed vehicles for advertising aimed at “woofies,” well-off older folk who fit the new stereotype of the greedy geezer. Aspirational cluster marketing—the wanna-be approach—pairs tastes and values with products; “value trend” marketing pairs products with ideas and beliefs.

In “Specialty Magazines and the Older Reader,” freelance age-beat reporter John Cutter raises questions about the potential of some age-niched media to further social class divisions and inter-generational tensions. “With their heavy supply of articles on financial planning, travel, and healthy aging, there is reason to wonder whether specialty magazines for older readers are including news of all communities...there is danger when the perception of a leisure class of elders becomes a dominant

image in one segment of the media and a foundation upon which to make social and political decisions" (2001). The "woofie" image may be a problem also because it creates unrealistic expectations of what late life should be, much as age-segregated publications for teens raise concerns about body image and social values.

While a combination of mature actors, dramatic content, camera work, and editing can draw an "older demographic" to any given production, mainstream films and entertainment programming for "seniors only" are rare. This may change with the aging of the boomers. *The Big Chill* (1983) is an early example of the many feature films that have already targeted boomers by using music, storyline, and visual techniques to evoke nostalgia.

A second, much larger format for images of aging frames older people as objects for examination. Most "problem" reporting falls in this range, particularly scare stories about Medicare, Social Security, Alzheimer's disease, and social issues identified with the graying of the population. In fact, objectification seems to be the dominant rhetorical vehicle for both television and print media, mirroring the culturally ingrained habit of talking about older people rather than to them. Cirillo (1994) offers a brief but suggestive look at how news magazines employ metaphor and other rhetorical tropes in age-related discussions of health and the body (he also cites a relevant piece by Kenyon, Birren and Schroots 1991). Cirillo's article is useful because it focuses on an area in which journalists and editors can exert control—the craft of writing itself. (A wealth of information about journalism craft and practice can be found at [www.Poynter.org](http://www.Poynter.org).)

Although individual organizations publish in-house guides, the *Associated Press Stylebook* and *Briefing on Media Law* is a newspaper industry standard. Under the heading "elderly" this source cautions: "Use this word carefully and sparingly." One circumstance under which the term is deemed "appropriate" is "in generic phrases that do not refer to specific individuals: *concern for the elderly, a home for the elderly, etc*" (2000, emphasis in original). In other words, describing a person as "elderly" is bad form, although the generalized category "elderly" might not be considered offensive. A subsequent statement is particularly revealing: "If the intent is to show that an individual's faculties have deteriorated, cite a graphic example and give attribution for it" (2000).

Sensitivity to a word's negative connotations is a step toward modifying stereotypes; attention to "the" categories is another. It may foreshadow things to come that "Generation X" stands alone, unlike "the elderly" and "the baby boom generation."

Some entertainment programming made for television falls into the objectification category, with the unfortunate effect of reinforcing stereotypes. As a review of the literature demonstrates, however, the deliberate presentation of negative stereotypes has declined. What remains is the much more complex issue of how verbal and visual representations are deeply bound to underlying cultural constructions, how they help to constitute a worldview. It is worth noting that boomers have been raised on age-objectifying news and entertainment formats and remain their largest audience.

Work that integrates age as a significant factor in issues of diversity, public policy, families, and the future can be found across all media formats. The efforts of age-beat reporters in reframing established presentations have already been discussed. Both advertising and entertainment programming on television offer examples of intergenerational contact that can be used as models for social interaction, problem solving, and constructive engagement. Contemporary film offers many outstanding examples of complex older characters who play meaningful social roles and much potential for expanding this platform further.



## 6

## Conclusion

In a recent report on the history and demise of the innovative Gannett Center for Media Studies at Columbia University, Dennis and Stebenne reflect on the historically weak relationship between media industries and academic institutions. One result is the absence of a comprehensive, influential body of literature on media production, not just media products. Citing Jurkowitz (1992), Dennis and Stebenne note that “the United States, unlike Britain or France, had little tradition of serious media criticism. Few critics or scholars reached beyond small, elite audiences. And much of the criticism from various media watchdog groups and ideologically oriented study centers offered up predictable results that lacked credibility and were ignored by all but their own partisans” (Dennis and Stebenne 2003). Ongoing research suggests that consumer-end studies (content analyses, audience response surveys) present the news industry through the wrong end of the telescope, offering little that is recognizable to journalists themselves (Vesperi unpublished).

These issues are significant because any effort to prompt new thinking about media responsibility for images of aging requires credible insights that will command attention among practitioners. Unfortunately, much of the literature on aging in the media reviewed thus far displays the characteristics identified by Dennis and Stebenne: Its credibility and effectiveness fade as it moves further from constituencies who are already convinced of its veracity. The problem is much deeper than some scholars' fondness for discipline-specific terminology or the restricted circulation of the academic journals in which much of the work has appeared. Reporters have ready access to most publications and a surprisingly strong appetite for jargon when it garnishes information they need for an assignment or beat. The research on media imagery is both more and less than a collection of facts, however, and industry professionals encounter a series of stumbling blocks in using it to implement change. First, as noted above, the content analysis method is subjective with regard to how taxonomies are created and how particular images are coded as positive, negative, or neutral. Second, the method combines data from unrelated sources, treating “the media” as a monolithic institution with unified intent. Finally, content findings are almost always attached to a set of

generalized statements about the product, with no attention to the divergent cultures, constraints, and goals of those who produce it.

Any effort to change widely promulgated images and perceptions of aging will require analysts to deconstruct these assumptions and focus instead on the workplace concerns of those who generate and select them. This strategy, called “studying up” by anthropologists, is difficult to execute because it requires access to sources of power. Most social scientific research is based on “studying down,” situations in which experts descend from privileged academic institutions to gather street-level knowledge. In the case of media studies, this often consists of watching television or documenting print sources, sometimes combined with audience response surveys. Analysts then freely extrapolate motive from this data in ways that were standard during the colonial era but would never be sanctioned in contemporary studies of Western or non-Western communities. Put baldly, academic experts assume that they know what media natives are thinking—and that it isn’t very complicated.

Sociologist John B. Thompson explains it this way in his introduction to *The Media and Modernity*: “It is perhaps surprising that, among the works of social theorists who have concerned themselves with the rise of modern societies, there are so few which have treated communication media with the seriousness they deserve...Partly it is due, no doubt, to a certain attitude of suspiciousness toward the media. For theorists interested in long-term processes of social change, the media may seem like a sphere of the superficial and the ephemeral, a sphere about which, it may seem, very little of any substance can be said” (1995). While access to top decision makers may be limited, scholars would be well served by looking more closely at the internal research conducted regularly by media industries.

Those who study images of aging in the media are clearly interested in documenting social change and in influencing its future direction by sensitizing producers to ageist stereotypes and the symbolic impact of a disproportionate emphasis on youth. Any effort to achieve this goal will require active, informed collaboration with media professionals. The moment before the “age wave” breaks is truly a unique opportunity for prompting new thinking about media responsibility for perpetuating and creating images of aging in the United States.

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The Report is also available at:  
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