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Enhancing Volunteerism among Aging Boomers

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Contents

Executive Summary	50
1. Population Trends	52
2. Volunteer Trends	58
3. Attitudinal Trends	69
4. Behavioral Trends	75
5. Summary and Conclusions	85
References	87

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.

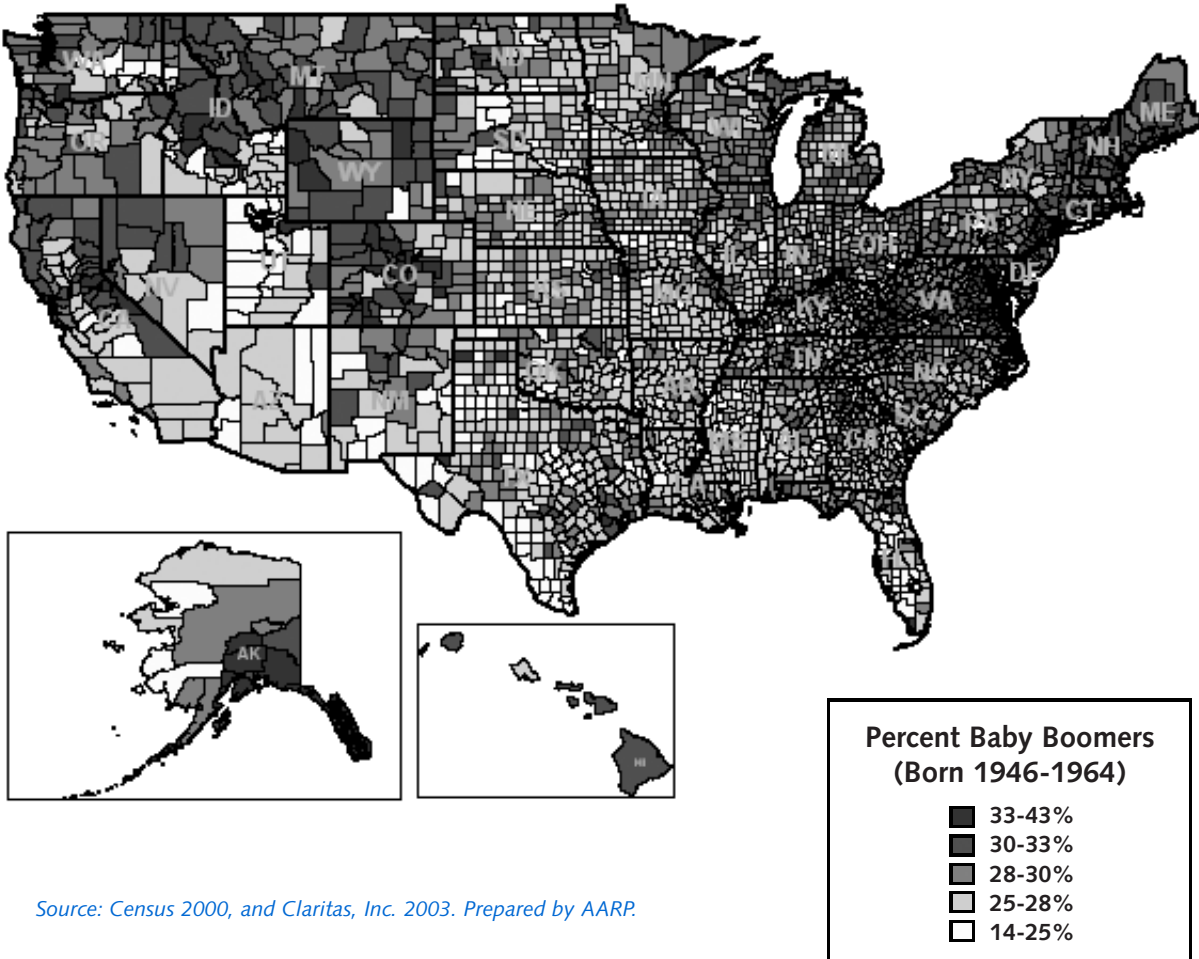
Marital and Family Status: Most boomers (70 percent) are married, but they are more likely than those older than themselves to be divorced/separated (17 percent vs. 11 percent) or never married (12 percent vs. 5 percent). Conversely, the baby boom is less likely to be widowed (2 percent vs. 23 percent). (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.

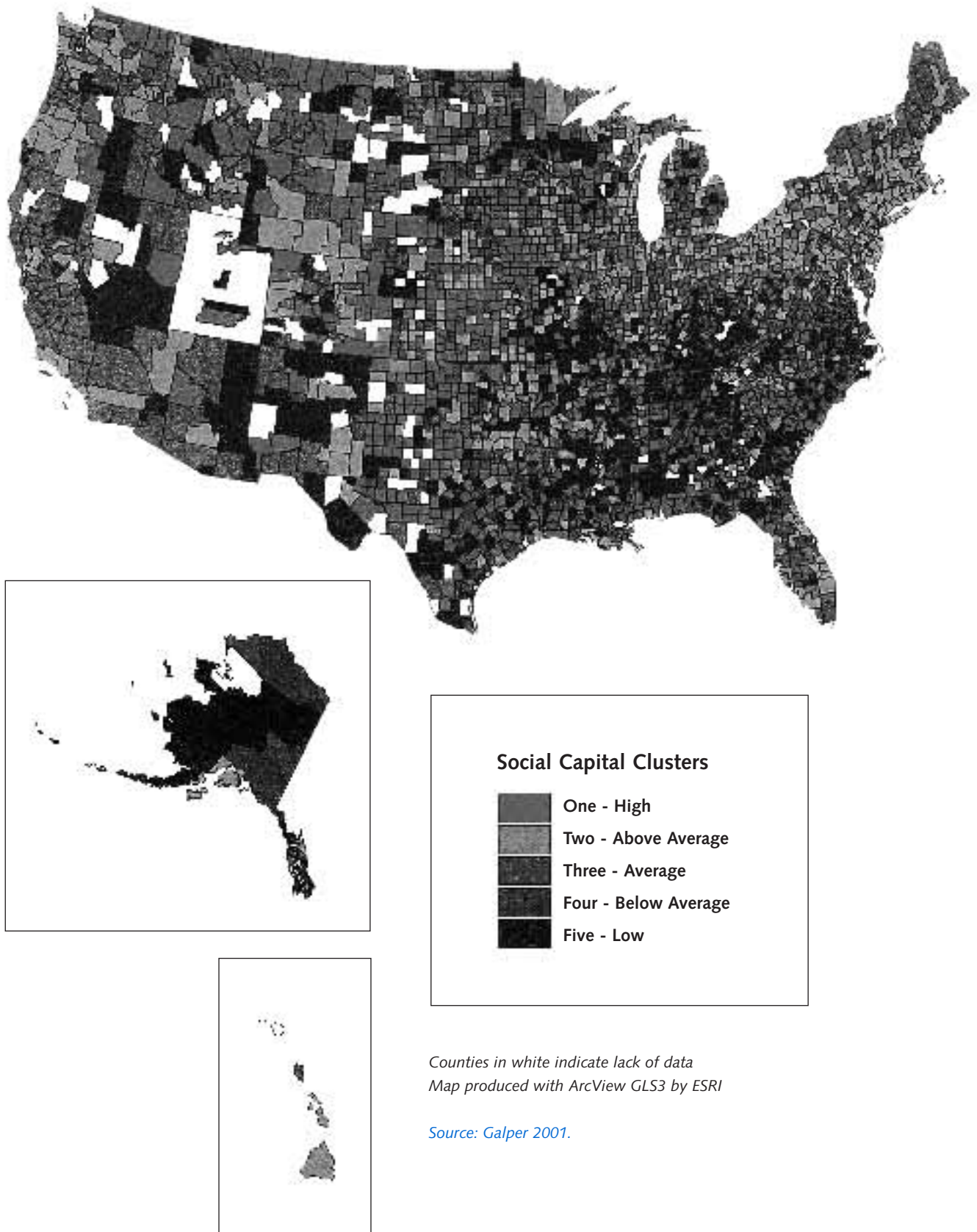
Rosenkoetter, Garris, and Enghda (2001) found that retirement typically brings with it an increase in sedentary activities, hobbies, and religious activities, but no change in physical exercise or social activities.

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 volunteer23%

Dislike volunteering/actively volunteer.....2%

Dislike volunteering/don't volunteer25%

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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