

AARP Survey on Lifelong Learning

Learning  Never Ends
EDUCATION IN THE 50+ YEARS

NRTA

A Division of AARP

Conducted for AARP by Harris Interactive Inc. • New York, New York • July 19, 2000



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**Harris Interactive Inc.
New York, New York
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AARP is the nation's leading organization of people age 50 and older. It serves their needs and interests through information and education, research, advocacy, and community services, which are provided by a network of local chapters and experienced volunteers throughout the country. The organization also offers members a wide range of special benefits and services, including *Modern Maturity* magazine and the monthly *Bulletin*.

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EXECUTIVE SUMMARY

AARP commissioned Harris Interactive Inc. to conduct a survey of 1,019 people age 50 and older to explore how and why people over 50 learn about new things. The final weighted sample included 508 interviewed by telephone and 511 (weighted down from 2,556) surveyed online. (See Appendix B for detailed methodology.) This research explores typical learning methods, learning motivations, learning interests, and the life-event contexts in which learning takes place. Key Findings in these important areas are detailed below.

How Adults Typically Learn

Newspapers, magazines, books, and journals are the tools used for learning most of the time by adults age 50 and older regardless of age, gender, income, or education.

- On the whole, over six in ten adults in this age group (64%) always or most of the time use newspapers, magazines, books, and journals when they want to learn.
- Women (66%); men (62%); and people of different ages (57% - 70%), economic (63% - 66%), and educational (61% - 73%) backgrounds use these tools always or most of the time in greater proportions than all other learning methods.

Not surprisingly, more respondents interviewed online typically use online techniques than those interviewed by telephone.

- Over half of adults 50 and older (56%) interviewed online search the Internet always or most of the time to learn about something they want or need to know compared to 14% of respondents interviewed by telephone.

Best Ways to Learn

Reflective and hands-on approaches are among the best ways for older adults to learn.

- Nine of ten adults 50 and older (90%) agree that they learn best by watching or listening and then thinking.
- The same proportion (90%) agree that they learn best by putting their hands on something and manipulating it or figuring it out.

Why Older Adults Want to Learn

Older adults are interested in learning so that they can keep in touch with themselves, their community, and the world.

- Over nine of ten adults age 50 and older agree that they want to learn:
 - ◊ To keep up with what's going on in the world (93%)
 - ◊ For their own spiritual or personal growth (92%)
 - ◊ For the simple joy of learning something new (91%)
- This level of agreement is seen across most demographic subgroups including education, income, gender, and age.

Interest in Various Subjects

Adults 50 and older are most interested in learning about subjects that would improve the quality of their lives, build upon a current skill, or enable them to take better care of their health. Six topics generate the greatest interest :

- A favorite hobby or pastime (62% extremely or very interested)
- Advanced skills (52% extremely or very interested)
- Getting more enjoyment or pleasure out of life (51% extremely or very interested)
- Having a healthy diet and nutrition (49% extremely or very interested)
- Measuring personal health status (48% extremely or very interested)
- Managing stress (46% extremely or very interested)

Preferred Learning Formats

Older adults' preferred learning formats vary according to the topic under study. However, for 11 of the 17 topics about which they were asked, respondents express preferences for three of eight formats: learning in loosely-structured groups, in workshop settings, or by teaching themselves.

Degree of Investment

Adults 50 and older are eager to use what they learn, want to have at least some control over the learning process, and are typically willing to spend modest sums of money to learn.

- Roughly half of adults 50 and older want to use what they learn immediately (55%). They are also willing to spend some time learning if they have control over when and how much time is spent (47%).

- Three in ten are willing to wait until some time in the future to use their new skills (28%) and are willing to spend all the time it takes to learn about something they really want to know (30%).
- On average, respondents are willing to spend a maximum of \$101.

Incidence and Impact of Events

Older adult learners experience different life events at different ages. Respondents between 50 and 59 are somewhat more likely than older ones to have experienced these family-related events or new accomplishments:

- Become a caregiver for a child or grandchild (19% of those age 50 – 59 versus 14% of those age 60 – 74)
- Had a child go to college (18% of those age 50 – 59 versus 10% of those age 60 – 74 and 5% of those 75 or older)
- Had their last child move out of their home (15% of those age 50 – 59 versus 10% of those 60 – 74 and 7% of those age 75 or older)
- Had an adult child move back into their home (15% of those age 50 – 59 versus 9% of those age 60 – 74 and 6% of those age 75 or older)

Over half of adult learners surveyed (53%) say they experienced at least one event with a major impact in their life in the past 12 months. Of those experiencing a major event, health-related and caregiving events had the greatest reported impact on their everyday lives:

- having a major personal illness (61%)
- having a major illness in the family (56%)
- having a death in the family (56%)
- becoming a caregiver to a parent or other elderly family member (50%)

Conclusions

Lifelong learning experiences that would likely hold the most appeal for mature adults include subjects that are personally meaningful, taught in environments which provide a direct learning experience, allow adults control over all aspects of the learning process, and are not too expensive. Adults age 50 and older learn for the simple joy of learning, to enhance their spiritual or personal growth, and to keep up with what is going on in the world. These reasons are rather universal—large proportions of men, women, those from different economic and educational backgrounds, and from different age groups express agreement with these reasons for learning.

Mature adults prefer learning methods that are easy to access, that require small investments of time and money to get started, and that allow learning to begin immediately. Print media such as books, magazines, newspapers, and journals are the learning tools used most frequently by adults regardless of differences in age, income, education, or gender. Not surprisingly, adults interviewed via the Internet are more likely than those interviewed by telephone to search the Internet or use computer-based learning programs as a learning method.

The least common methods used to aid learning include techniques that require greater investments of time, money, and effort as they serve to delay the learning process. Over half of adults 50 and older report they never learn by buying or borrowing computer-based teaching programs, or audio or video tapes, finding a tutor or professional, enrolling in a college or community college class, or by getting involved in a community group or volunteer organization.

The best way most older adults report they learn is through a direct, hands-on experience. The two most common, best-learning methods engage three of the five senses – seeing, hearing, and touching. Nearly all middle-age and older adults say they learn best by putting their hands on something, playing with it, listening to it, watching it, and finally thinking about it.

Adults 50 and older are interested in learning most about things that enrich their lives, that help them stay healthy, and that bring them more enjoyment. Roughly half of adults are interested in learning about favorite hobbies or pastimes, new advanced skills, how to get more enjoyment out of life, and having a healthy diet and nutrition.

Mature adult learners (despite some differences in age, gender, income, and education) prefer some type of *group* learning environment when it comes to such topics as understanding others better, getting involved in their community, or finding out about educational travel opportunities. However, these adults prefer some type of *individual* setting to learn about topics that are of direct personal benefit. These topics include all the health-related subjects and learning more about a favorite hobby or pastime.

A number of important factors should be considered when creating learning programs for adults age 50 and over. These include the degree to which adult learners have control over the learning process, how soon they can put into practice their new skills and ideas, and not surprisingly, how much the programs cost. Adults are typically willing to spend up to \$101 to learn about something they always wanted to know about. Most adults 50+ want to use what they have learned right away or in the near future; very few are willing to wait longer. While about half are willing to devote at least some time to developing their new skills (if they can control when and how much), one-third are willing to take all the time it takes to master their new ability.

INTRODUCTION

AARP commissioned Harris Interactive Inc. to conduct a survey of people age 50 and older to explore how and why people over 50 learn about new things over their lifetime. This research explores typical learning methods, learning motivations, learning interests, and the life-event contexts in which learning takes place.

The survey has six objectives:

- Ways adults typically learn
- Why adults want to learn
- When adults want to use what they learn
- Time and money adults are willing to invest in learning
- What adults are interested in learning about, particularly for wellness and personal enrichment topics
- How adults prefer to learn about topics of interest

Interviewing was conducted by telephone and via the Internet. In evaluating the results, age, income, gender, and education as well as the incidence and impact of different life events were considered. The results discussed in this report reflect the weighted totals of the combined telephone and online samples. Where there are differences in results between the online and telephone subgroups, these differences are noted.

The Survey Sample and Weighting

The Lifelong Learning Survey includes interviews with 1,019 adults age 50 or older: 508 interviewed by telephone and 511 (weighted down from 2,556) interviewed online. For the telephone sample, adults age 50+ were selected randomly from a telephone database of past Harris survey participants (who were originally identified through a random digit dialing process) and contacted by telephone. For the online sample, email invitations were sent to randomly selected members age 50+ of the Harris Interactive online database. Interviews were conducted between August 27 and September 5, 1999, and averaged approximately 15 minutes in length.

Using the 1999 Current Population Survey, the online and telephone interviews were weighted by age, gender, race, ethnicity, education, and income.¹ In addition, and for purposes of comparing the telephone and online samples, the online interviews were weighted down (from 2,556 to 511 respondents) so that, when weighted, online (511) and telephone (508) samples are roughly equal in size.

Response Rates

The telephone response rate was calculated using the guidelines set forth by the American Association for Public Opinion Research (AAPOR). More specifically, the response rate for the telephone sample was 33%. In the absence of AAPOR guidelines, a comparable formula was developed and a 34% response rate for the online sample was calculated. The formulas and calculations are detailed in Appendix B.²

The methodology is presented in Appendix B. The survey questionnaire appears in Appendix C, along with the response frequencies for each question for the combined online and telephone samples and for each sample.

Notes on Reading Tables

The text of the report references Exhibits (for example, Exhibit 1-1, 1-2) and Tables (for example, Table A1, A2). The Exhibits appear within the body of the report and the Tables appear in Appendix A.

An asterisk (*) on a table signifies less than one-half percent (0.5%). A dash represents a value of zero. Percentages may not always sum to 100% because of computer rounding, the acceptance of multiple answers from respondents, or the collapsing of data across subgroups. The base for each question is the total number of respondents answering those questions. Note that in some cases, results may be based

¹ The telephone interviews were also weighted by region.

² Note that response rate calculations are based on the total beginning sample, including non-contact and refusals. Of those contacted in the telephone sample, for example, the completion rate for the interviews was 95%.

on small sample sizes. This is typically true for questions asked of subgroups less than the total sample. Caution should be used in drawing any conclusions from the results based on these small samples.

Project Responsibility and Acknowledgments

Harris Interactive Inc. would like to thank Albert Hollenbeck, Teresa Keenan, and Roslyn Tartaglione from AARP for their valuable contribution to this project. The survey was conducted by Harris Interactive Inc. under the direction of David Krane, Senior Vice President; Michele Salomon, Senior Research Associate; and Diana Gravitch, Research Associate.

Public Release of Survey Findings

All Harris Interactive Inc. surveys are designed to comply with the codes and standards of the Council of American Survey Research Organizations (CASRO) and the code of the National Council of Public Polls (NCPP). Because data from the survey may be released to the public, release must stipulate that this complete report is also available.

CHAPTER ONE: OVERALL FINDINGS

Respondents favor learning methods that are easily accessible, that allow them to begin learning immediately, and that require minimal investments of time and money. Adults want to learn for various reasons, the most common of which are related to keeping in touch with themselves, their community, and their world. Most adults are interested in learning about topics that will help them enrich their lives.

How Adults Typically Learn

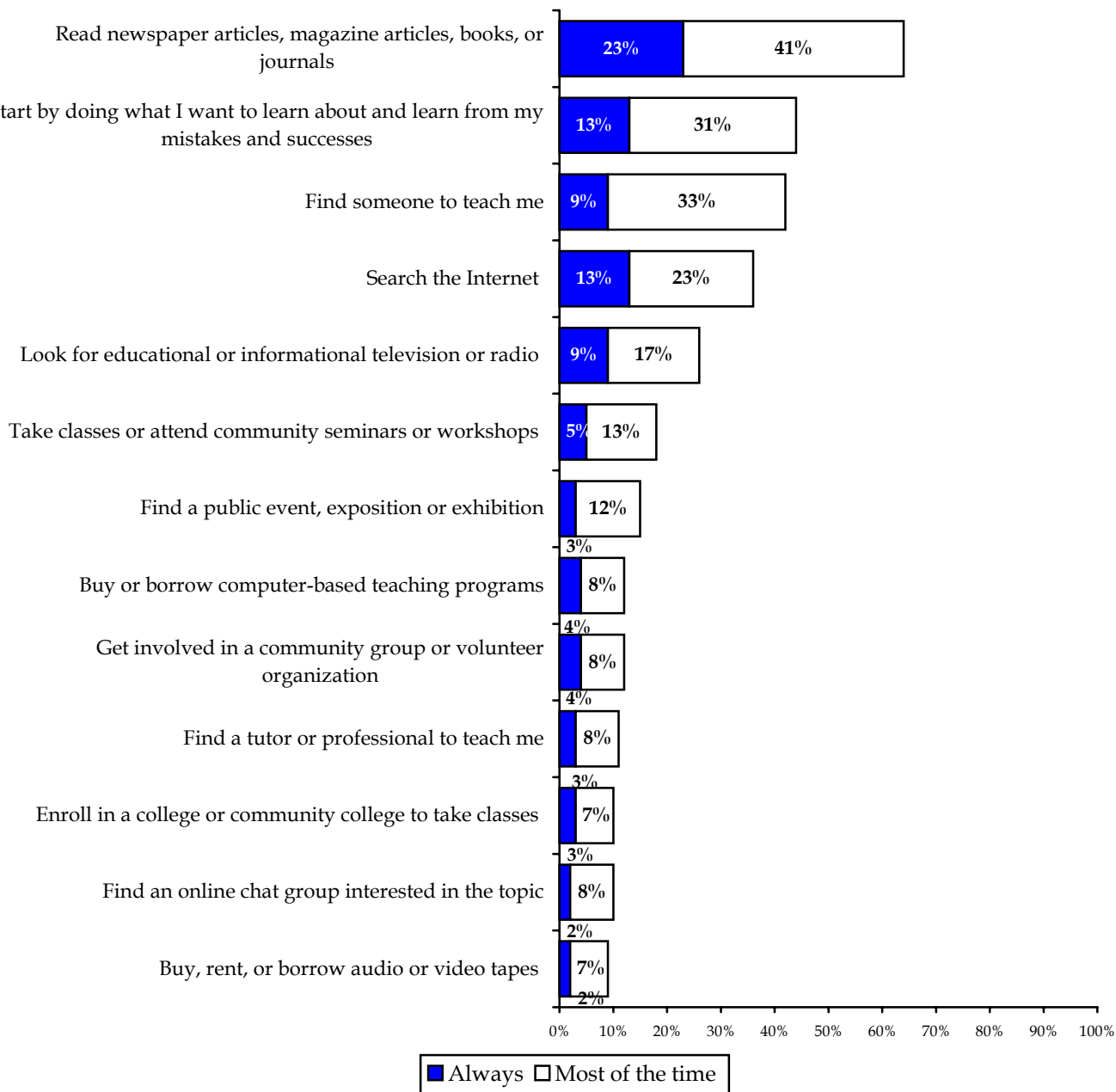
Adults age 50 and older use learning methods that are readily accessible. These methods allow them to begin learning right away with a minimum investment of time or money. Adults age 50 and older most commonly read newspaper and magazine articles, books, or journals when they want or need to learn something new. Over six of ten adults in this age group (64%) use this method always or most of the time, the only method so used by more than half the sample (Exhibit 1-1).

Two other methods used by substantial numbers—over four out of ten respondents—are also easily accessible and require relatively small amounts of time and money:

- Starting by doing what they want to learn about and learning from their mistakes and successes (44% say always or most of the time)
- Finding someone to teach them such as a friend, co-worker, or family member (41% say always or most of the time)

Other media outlets such as TV, radio, and the Internet are also relatively common methods for learning. Over half (56%) of the online sample search the Internet, and three in ten (29%) of the online sample look for educational or informational television or radio programs always or most of the time. The online and telephone samples differ in two ways on this measure. Sixty-eight percent of respondents from the online sample versus 60% from the telephone sample typically “read newspaper articles, magazine articles, books, or journals” to learn. Fifty-six percent of online respondents versus 14% of telephone respondents selected “search the Internet” as a common learning mode.

Exhibit 1-1. Ways Older Adults Learn (% Always or Most of the Time)
When I want or need to learn something I ...³



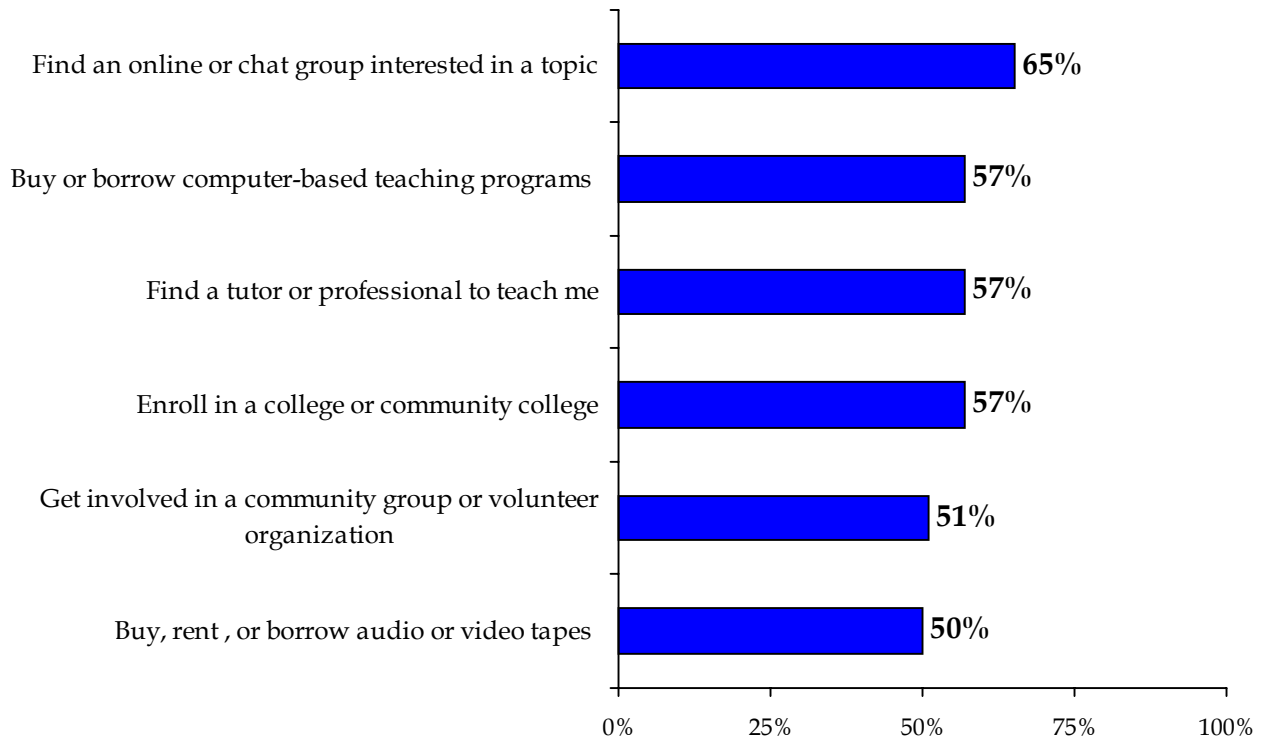
Q21. For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way. Base: All respondents (n=1019)

³ Note: For “search the Internet,” 14% of the telephone sample and 56% of the online sample (36% of the total sample) use this learning technique “always or most of the time.” Similarly, for “buy or borrow computer-based teaching programs,” 7% of the telephone sample and 16% of the online sample (12% of the total sample) use this learning technique.

Learning modes that require more effort and technology are the least-commonly used methods adults use always or most of the time (Exhibit 1-2).

Exhibit 1-2. Least Common Ways Older Adults Learn (% Who Never Learn this Way)

When I want or need to learn something I...(never)⁴



Q21. For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way. Base: All respondents (n=1019)

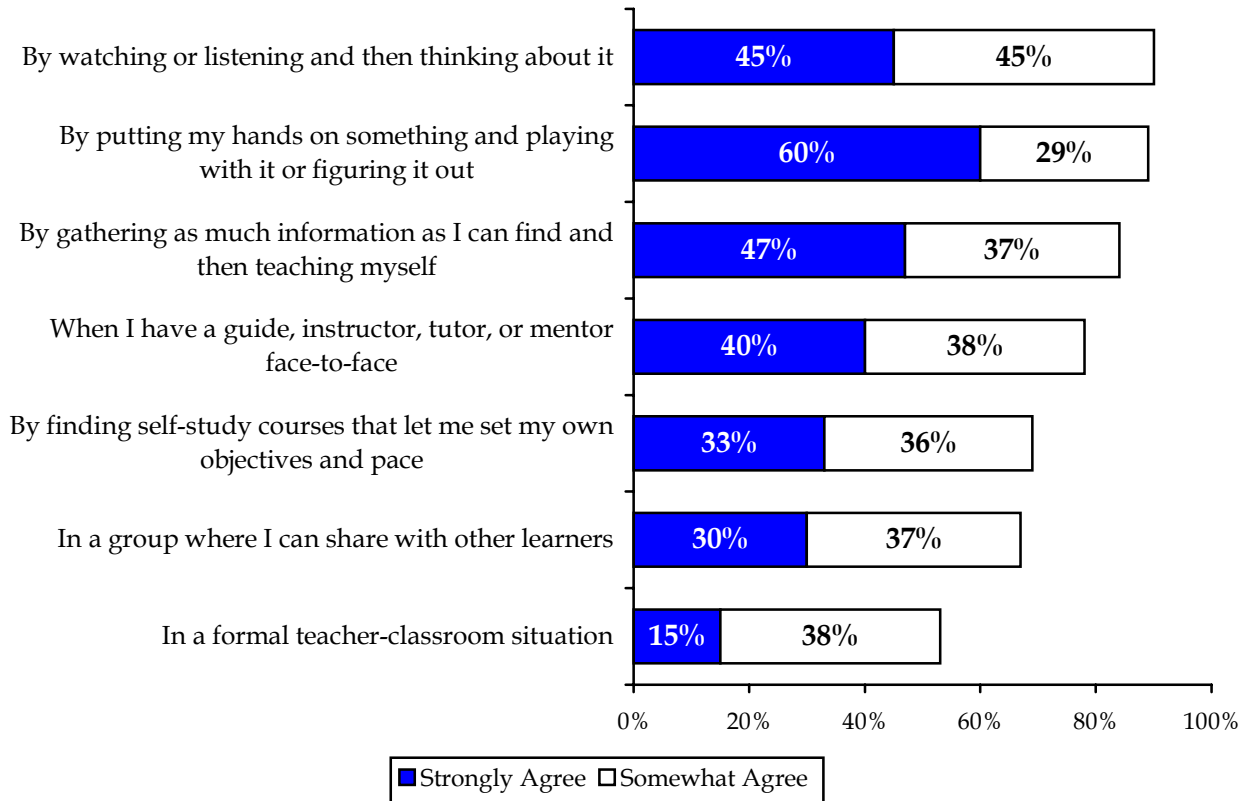
Best Ways to Learn

The vast majority of adults 50 and older agree they learn best by putting their hands on something and playing with it or figuring it out (89% agree, including 60% who strongly

⁴ Note: For “find an online or chat group interested in a topic,” 78% of the telephone sample and 52% of the online sample (65% of the total sample) “never” use this learning technique. Similarly, for “buy or borrow computer-based teaching programs,” 74% of the telephone sample and 40% of the online sample (57% of the total sample) never use this learning technique.

agree), by gathering as much information as I can find and then teaching myself (84% agree, including 47% who strongly agree), or by watching or listening and then thinking about it (90% agree, including 45% who strongly agree). It is worth noting that these activities require little investment of money or time (Exhibit 1-3).

Exhibit 1-3. Best Ways to Learn
(% Strongly or Somewhat Agree)



Q71. The next few statements focus on the best ways for you, personally, to learn. Please tell us if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with them. Base: All respondents (n=1019)

Why Older Adults Want to Learn

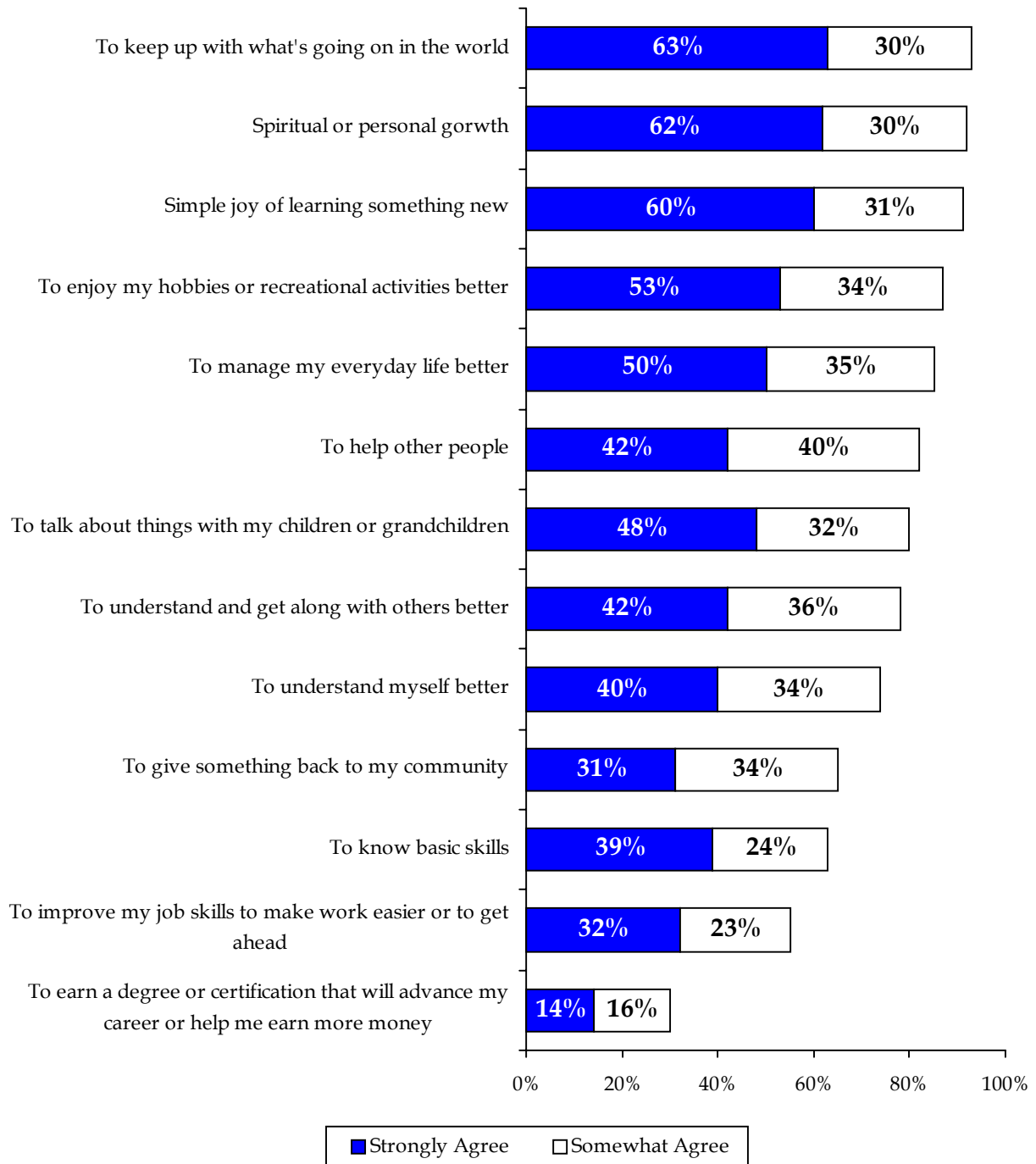
The most common motivations for learning among mature adults relate to keeping in touch with their environment and themselves and for the enjoyment learning brings. Nine in ten adults age 50 and older agree (including 60% or more that strongly agree) that they want to learn for three reasons:

- To keep up with what's going on in the world (63% strongly agree)
- For their own spiritual or personal growth (62% strongly agree)
- For the simple joy of learning something new (60% strongly agree)

More than seven in ten adults age 50 or older also learn in order to enrich their lives by better understanding themselves and others, managing their everyday life, enjoying their hobbies better, and talking with their children and grandchildren.

Learning to advance one's career or to improve job skills is somewhat less important to mature adults. While a majority of adults (55%) agree that they want to learn to improve their job skills, substantially fewer (30%) agree that a reason they want to learn is to earn a degree or certification that will advance their career or help them to earn more money (Exhibit 1-4). Responses to these two items did not differ by gender. However, younger respondents are more likely than older ones to strongly or somewhat agree that they learn to improve their job skills (74% for those age 50-59 vs. 45% for those age 60-74 and 33% for those age 75 and older) or earn a degree or certification (44% vs. 24% and 16%).

Exhibit 1-4. Reasons for Learning
 (% Strongly or Somewhat Agree)



Q51. These next statements describe why you want to learn. Tell us whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each one. Base: All respondents (n=1019)

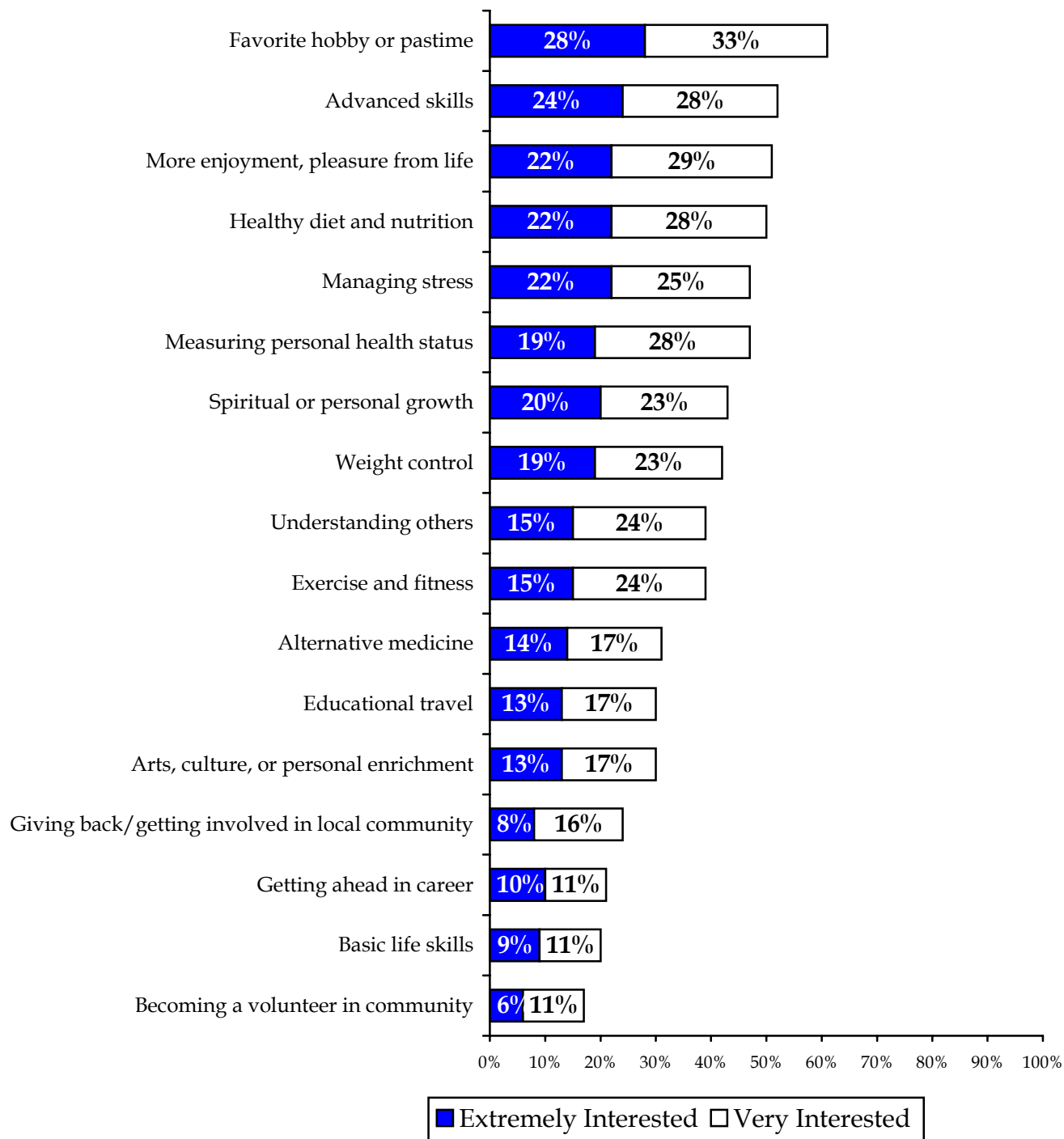
Interest in Various Subjects

Interest in learning specific subjects varies by topic. The largest proportions of adults are interested in learning about information of personal benefit. The smallest proportions are interested in learning about activities that relate to their larger world (Table A1, Appendix A).

The most popular topics (in which roughly half of adults are extremely or very interested) include these six subjects (Exhibit 1-5):

- Learning about a favorite hobby or pastime (61%)
- Mastering advanced skills (52%)
- Getting more enjoyment or pleasure out of life (51%)
- Having a healthy diet and nutrition (50%)
- Managing stress (47%)
- Measuring their personal health status (47%)

Exhibit 1-5. Subjects of Interest
 (% Extremely or Very Interested)



Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...
 Base: All respondents (n=1019)

Conversely, the four subjects for which respondents express the least enthusiasm are giving back/getting involved in the local community, getting ahead in one's career, learning basic life skills, or becoming a community volunteer (Exhibit 1-5).

Preferred Learning Formats

Respondents were asked their preferred learning format—classroom, workshop, group, tutor or pro, teaching yourself, self study course, Internet, something else—for each topic in which they expressed an interest. The most preferred learning formats vary by topic (Table A2, Appendix A). Mature adults prefer *groups* for topics and activities that relate to their relationships with larger communities. Among those extremely or very interested in these five topics, a plurality prefer a group format:

- Becoming a volunteer in their community (40%)
- Giving back or getting involved with their local community (35%)
- Getting along with others (34%)
- Learning more about spiritual or personal growth (32%)
- Getting more enjoyment or pleasure out of life (28%)

Pluralities prefer workshops to learn about fairly localized subjects with which one may have some familiarity but would like more or different information such as:

- Giving back or getting involved with their local community (30%)
- Becoming a volunteer in their community (27%)
- How to get ahead in your job or career (23%)

Older adults prefer to *teach themselves* about issues over which they have some control and that are largely personal:

- Having a healthy diet and nutrition (28%)
- Learning about a favorite hobby or pastime (27%)
- Learning about exercise and fitness (24%)
- Learning about weight control (24%)
- Managing stress (20%)
- Measuring their own personal health status (19%)

Older adults prefer *classrooms* for subjects that require both instruction and practice to master such as:

- Master an advanced skill such as using a computer, becoming fluent in a foreign language, or preparing taxes (23%)
- Learn basic life skills such as reading, writing, basic math, or learning to drive (23%)

Pluralities overall and far more online respondents than telephone respondents indicate they prefer the *Internet* to learn about:

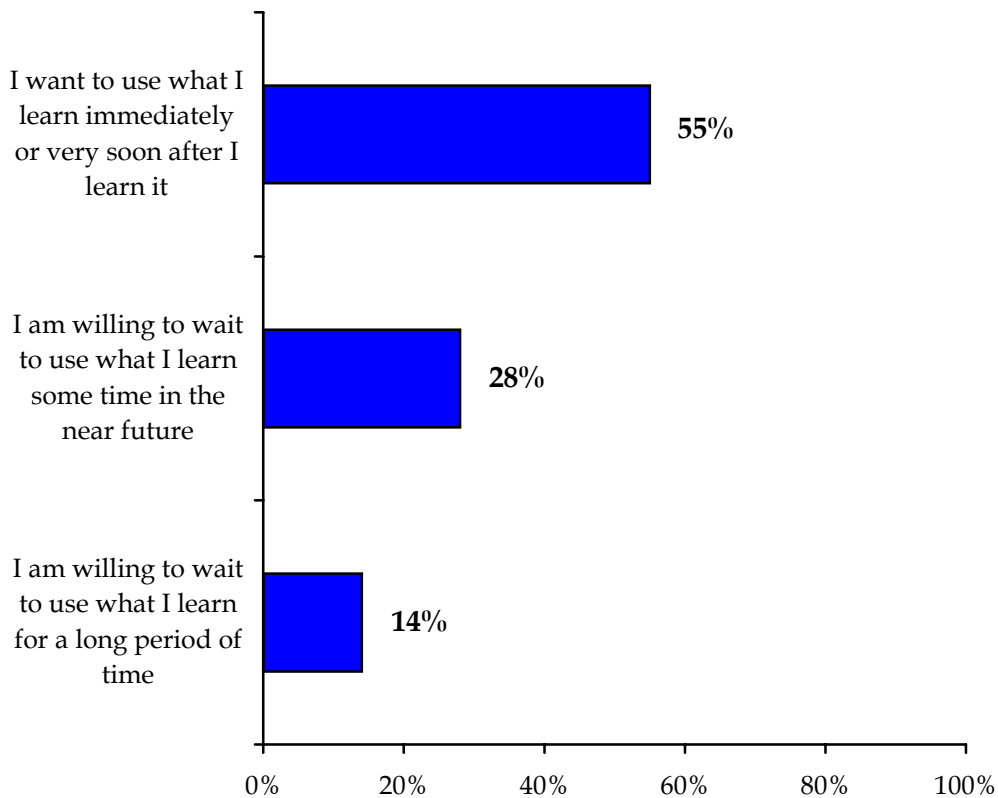
- Educational travel opportunities (25%, including 30% of those surveyed online vs. 15% of those surveyed by telephone)
- Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy (17%, including 26% of those surveyed online vs. 4% of those surveyed by telephone)

These topics represent relatively new subject matters for most individuals; and the Internet may represent the learning mode with the fastest adaptability to more avant-garde topics.

Degree of Investment

Fully half of adults age 50 and older want to use what they learn immediately or very soon after they learn it (55%), and nearly three in ten (28%) are willing to wait until some time in the near future (Exhibit 1-6).

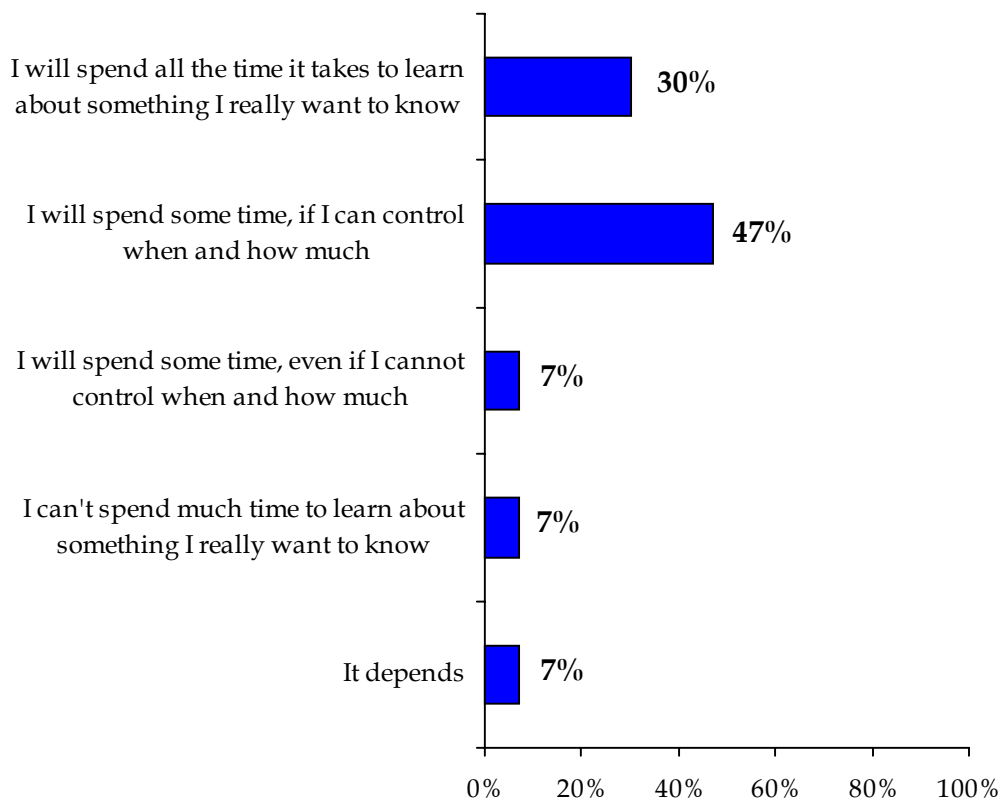
Exhibit 1-6. When to Use New Skills



Q60. Which of the following three statements best describes when you want to use what you learn? Base: All respondents (n=1019)

Adults age 50 and older are willing to spend time to learn their new subject, but control over this time is important. Nearly one-half (47%) will spend some time if they can control when and how much of this time is devoted to learning. Three in ten (30%) will spend all the time it takes to learn about something they really want to know (Exhibit 1-7).

Exhibit 1-7. Time Investment

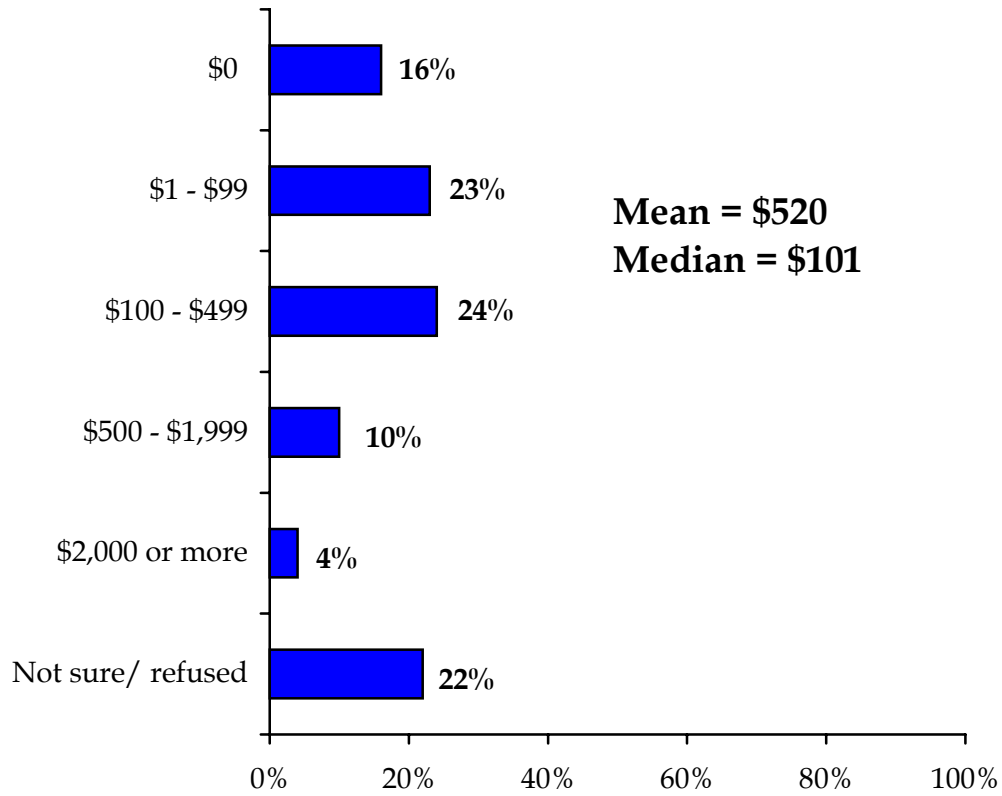


Q200. Which of the following four statements best describes how much time you are willing to invest? Base: All respondents (n=1019)

Respondents are typically willing to spend, at most, \$101 to learn about something they are extremely interested in or have always wanted to learn about.⁵ Roughly half (47%) of these learners are willing to spend between \$1 and \$499. Also worth noting is that 16 percent of respondents are not willing to make any financial investment to learn about something they always wanted to learn; but 14 percent are willing to spend \$500 or more (Exhibit 1-8).

⁵ Note that the median is based on those giving a dollar figure. The percentage responding in each dollar range is based on the total sample, including those “not sure/refused.”

Exhibit 1-8. Financial Investment



Q205. How much would you be willing to pay, at most, to learn about something you are extremely interested in or have always wanted to learn more about? Base: All respondents (n=1019)

CHAPTER TWO: DEMOGRAPHIC VARIABLES

Regardless of educational level, income, gender, or age, respondents report using similar methods of learning. The reasons they give for learning and the level of investment they are willing to commit are generally consistent across different populations. However, there are demographic differences in respondents' preferences and motivations for learning, their levels of interest in various topics, and their preferred learning formats. This chapter details those differences.

How Adults Typically Learn

The most typical method for learning across all demographic groups is by reading newspapers, magazines, books, or journals; but there are some notable differences by education, income, gender, and age.

Education. College-educated adults age 50 and older are more likely (73%) to use the print media always or most of the time than those with less than a college degree (65%) or those with a high school education or less (61% Table A4, Appendix A).

Further, those who have at least some college are more likely than those who have a high school education or less to use three learning methods:

- Take classes or attend community seminars or workshops (22% of those with some college and 27% of those with a college degree use this method always or most of the time vs. 13% of those with high school education or less)
- Enroll in a college or community college to take classes (13% of those with some college and 14% of those with a college degree vs. 7% of those with a high school or less education)
- Search the Internet for information (41% of those with a college degree and 37% of those with some college vs. 33% of those with a high school education or less)⁶

However, those respondents with a high school education or less are more likely than those with some college or more to prefer to learn by finding someone to teach them who

⁶ In the telephone sample, 26% of those with a college degree vs. 11% of those with a high school education or less "search the Internet."

knows about the topic (46% of those with high school or less education vs. 37% of those with some college and 33% of those with college degree or higher (Table A4, Appendix A).

Income. Those respondents with annual household incomes under \$50,000 are more likely than those with incomes of \$75,000 or more to prefer to start learning by doing something and then learning from their mistakes (48% vs. 36%). Respondents with incomes under \$50,000 are also more likely than those with incomes between \$50,000 and \$75,000 to learn by buying, renting, or borrowing audio or video tapes (11% vs. 5%). Finally, those with annual household incomes under \$50,000 are more likely than those in the higher income categories to prefer to learn by looking for educational or informational television or radio programs (32% vs. 18% for those with incomes between \$50,000 and \$75,000 and 14% for those with incomes of \$75,000 or more).

Respondents with annual household incomes between \$50,000 and \$75,000 are twice as likely as those with incomes of \$75,000 or more to say they always or most of the time learn by getting involved in a community group or volunteer organization (14% vs. 7%), even though the overall percentages are lower than for most of the other methods of learning. Also, the most affluent respondents—those with annual household incomes of \$75,000 or more—are more likely than respondents with incomes between \$50,000 and \$75,000 to prefer to learn by finding an online or chat group interested in the topic (14% vs. 6%).

Gender. For the most part, men and women report that they learn in similar ways (Table A13, Appendix A). The only gender difference in ways of learning is that women are more likely than men to say that they always or most of the time learn by looking for educational or informational television or radio programs (31% vs. 21%).

Age. Respondents age 50 to 59 are more likely than those age 60 to 74 to say they always or most of the time learn by finding someone to teach them about an interesting topic

(46% vs. 37%). They are also more likely than those age 75 or older to say they always or most of the time learn by searching the Internet for information (38% vs. 24%).⁷

Those in the 60 to 74 age category are more likely than those age 75 or older to say they always or most of the time learn by searching the Internet (37% vs. 24%).⁸ They are also more likely than those age 50 to 59 to say that they always or most of the time learn by reading newspaper or magazine articles, books, or journals on a subject of interest (70% vs. 50%).

Finally, the oldest respondents, those age 75 or older, are more likely than those age 50 to 59 to say they always or most of the time learn by doing what they want and then learning from their mistakes (52% vs. 41%) or finding a tutor or professional to teach them (17% vs. 10%).

Best Ways to Learn

Respondents generally agree from descriptions of seven learning formats that the “best” ways for them to learn personally are those that are informal and self-directed (Table A5, Appendix A). Specifically, there is strong agreement that the “best” ways to learn are by these methods:

- Putting one’s hands on something and playing with it or figuring it out (90%)
- Watching or listening and then thinking about it (90%)
- Gathering as much information and then teaching oneself (83%)

Overall, the fewest (53%) agree that a formal teacher-classroom situation is the “best” approach for them to learn.

⁷ In the telephone sample, 19% of those age 50 to 59 vs. 7% of those age 75 or older “search the Internet” always or most of the time.

⁸ In the telephone sample, 13% of those age 60 to 74 vs. 7% of those age 75 or older “search the Internet” always or most of the time.

Education. Those with at least some college are more likely than those with a high school education or less to say that such a formal setting is one of the best ways for them to learn (57% of those with some college and 60% of college graduates vs. 49% of those with a high school education or less). This preference for more formal learning environments is not surprising given that those with at least a college degree are more familiar with and have spent time in this type of setting.

Respondents with a high school education or less or those with some college are slightly more likely than college graduates to strongly or somewhat agree that they learn “best” by watching or listening and then thinking about it (92% of those with a high school education or less and 91% of those with some college vs. 86% of college graduates).

Income. Only one income difference emerges in “best” ways of learning. Respondents with annual household incomes less than \$50,000 are more likely than those with incomes of \$75,000 or more to strongly or somewhat agree that they learn best by finding self-study courses that let them set their own objectives and move at their own pace (74% vs. 59%).

Gender and Age. There are few gender and age differences in respondents’ “best” ways to learn (Table A14, Appendix A). Men are more likely than women to strongly or somewhat agree that they learn best by putting their hands on something and playing with it or figuring it out (93% vs. 87%) or by gathering as much information as they can and teaching themselves (87% vs. 80%). Those age 50 to 74 are more likely than those age 75 or older to strongly or somewhat agree that they learn best in a group where they can share with others (70% of those age 50-59 and 69% of those age 60-74 vs. 58% of those age 75 or older) or when they have a guide or mentor in a face-to-face situation (81% and 78% vs. 67%).

Why Adults Want to Learn

As noted in Chapter One, the main reason adults age 50 and older give for learning new things is to help them improve their lives by keeping up with what is going on in the

world. Specifically, more than nine out of ten adults strongly or somewhat agree that these are the most common motivations to start learning (Table A6, Appendix A).

Education. Not surprisingly, respondents with some college or less are more likely than college graduates to agree that they want to learn to basic everyday skills such as reading, writing, mathematics, or learning to drive (67% for those with a high school education or less and 63% for those with some college vs. 52% for college graduates). Moreover, those with a high school education or less are more likely than college graduates to agree that they want to learn so that they can talk about things with their children and grandchildren (82% vs. 74%).

In contrast, those with some college education or a degree are more likely than those with a high school education or less to agree that they learn so they can:

- Improve their job skills to make work easier or to get ahead (59% for those with some college and 60% for college grads vs. 52% for those with a high school education or less)
- Earn a degree or certification that will advance their career and help them earn more money (37% and 35% vs. 27%)
- Give back something to their community (72% and 69% vs. 61%).

Finally, those with some college are more likely than those with a high school education or less to strongly or somewhat agree that they learn so that they can help other people (86% vs. 79%).

Income. More-affluent respondents are more likely than less-affluent ones to agree that they learn to improve their job skills (67% for those with incomes between \$50,000 and \$75,000 and 63% for those with incomes of \$75,000 or more vs. 51% for those with incomes less than \$50,000 per year) or to earn a degree or certification (38% for those with incomes of \$75,000 or more vs. 28% for those with incomes of less than \$50,000).

In contrast, less-affluent respondents are a little more likely than more-affluent ones to agree that they learn so that they can talk with their children or grandchildren (84% for those with incomes of less than \$50,000 vs. 76% for those in the middle income category and 75% for those with incomes of \$75,000 or more) or for their own spiritual or personal

growth (93% for those with incomes less than \$50,000 vs. 88% for those with incomes between \$50,000 and \$75,000).

Gender and Age. There are few gender or age differences in respondents' motivations for learning (Table A15, Appendix A). Specifically, women are slightly more likely than men to strongly or somewhat agree that they learn so they can understand themselves better (76% vs. 70%), talk with their children and grandchildren (84% vs. 75%), or for their own spiritual or personal growth (93% vs. 89%). Moreover, younger respondents are more likely than older ones to strongly or somewhat agree that they learn to improve their job skills (74% for those age 50-59 vs. 45% for those age 60-74 and 33% for those age 75 and older), earn a degree or certification (44% vs. 24% and 16%), or understand themselves better (78% for those 50-59 vs. 70% for those 60-74).

When Adults Want to Use What They Learn

Although fully half (55%) of adults age 50 or older say they want to use what they have learned immediately or very soon after they have learned it, there are some educational and age differences.

Education. Adults with less formal education (high school or less) are more likely than those with more formal education to say they want to use what they have learned immediately or very soon after they learn it (57% vs. 48% for college graduates: Table A9, Appendix A).

Age. Those age 50 to 74 are more likely to say they want to use what they have learned immediately or very soon after having learned it (58% for those age 50-59 and 56% for those age 60-74 vs. 40% for those age 75 or older) while those age 75 or older are more likely to say they are willing to wait some time in the near future (41% for those age 75 or older vs. 29% for those age 50-59 and 24% for those age 60 to 74: Table A17, Appendix A). Finally, those age 60 or older are more likely than those age 50 to 59 to be willing to delay learning gratification by waiting a long period of time to use what they have learned (17% for those age 60-74 vs. 10% for those age 50-59).

Interest in Various Subjects

Respondents with the same backgrounds are generally interested in learning about the same topics, and almost all deal with self-improvement (Table A10, Appendix A).

Education. Those with at least some college education are more interested than those with a high school education or less in subjects that involve improving their existing skills or acquiring new ones:

- Mastering an advanced skill (56% of those with some college and 60% of college graduates vs. 48% of those with a high school education or less)
- Learning more about arts and culture (37% of those with some college and 47% of college graduates vs. 21% of those with a high school education or less)
- Finding out about educational travel opportunities (35% of those with some college and 43% of college graduates vs. 24% of those with a high school education or less)
- Learning more about a favorite hobby or pastime (66% of those with some college and 68% of college graduates vs. 58% of those with a high school education or less)
- Giving back to their local community (28% of those with some college and 28% of college graduates vs. 20% of those with a high school education or less).

Income. Since learning often requires a significant financial investment, it is not surprising that those with higher incomes express greater interest in topics that would seem to require greater monetary investments (Table A10, Appendix A). For example, those with annual household incomes of \$75,000 or more are more likely than those with incomes less than \$50,000 per year to say they are extremely or very interested in learning more about hobbies or favorite pastimes (70% for those with incomes of \$75,000 or more vs. 60% for those with incomes less than \$50,000) or arts and culture (39% vs. 27%).

Further, those with annual household incomes of \$50,000 or more are more likely than those with incomes below that figure to express high levels of interest in educational travel opportunities (36% for those with incomes between \$50,000 and \$75,000 and 46% for those with incomes of \$75,000 or more vs. 25% for those with incomes of less than \$50,000).

Notably, while interest in various subjects is generally consistent, there are a few gender and age differences which may be related to life stage and career patterns.

Gender. Women are more likely than men to say they are extremely or very interested in four subjects (Table A19, Appendix A):

- Alternative medicine or remedies (36% of women vs. 26% of men)
- Mastery of advanced skills (56% vs. 48%)
- Arts and culture (34% vs. 25%)
- Spiritual or personal growth (48% vs. 35%)

Age. Younger respondents are more likely than older ones to express high interest in these topics:

- Weight control (44% of those age 50-59 and 45% of those age 60-74 vs. 27% of those age 75 or older)
- Stress management (51% of those age 50-59 vs. 35% of those age 75 or older)
- Alternative medicines (32% of those age 50-59 and 35% of those age 60-74 vs. 18% of those age 75 or older)
- Job advancement (34% of those age 50-59 vs. 13% of those age 60-74 and 8% of those age 75 or older)
- Mastery of advanced skills (56% of those age 50-59 vs. 40% of those age 75 or older)
- Basic life skills (24% of those age 50-59 vs. 17% of those age 60-74)
- Hobbies (65% of those age 50-59 and 63% of those age 60-74 vs. 50% of those age 75 or older)
- Educational travel opportunities (33% of those age 60-74 vs. 21% of those age 75 or older)

Preferred Learning Formats

Respondents across various demographic subgroups generally favor group formats (classrooms, workshops, or group settings) for learning about their community, the arts and culture, spiritual and personal growth, understanding others. They prefer to learn about topics that seem more personal, such as their own health or their stress levels, on an individual basis (with a tutor, teaching themselves, using self-study, or using the Internet). Even though there are few demographic differences, they bear noting (Table A11 and Table A12, Appendix A).

Education. For 5 out of 17 topics, those with higher education levels prefer group learning formats for highly personal topics – a pattern different from the general preference for individualized formats for personal topics and group learning formats for topics concerning relations with the larger community:

- Roughly four in ten respondents with at least some college (39% of those with some college and 43% of college grads) express a preference for learning about having a healthy diet or nutrition in a group setting compared with slightly more than one-quarter (27%) of those with a high school education or less.
- Over half (52%) of the respondents who have a college degree say they prefer to learn about managing stress in a group setting compared with four in ten (39%) who have a high school education or less.
- Over half (55%) of the respondents who have a college degree prefer a group setting to learn about mastering an advanced skill compared with four in ten (41%) with a high school education or less.
- Respondents with some college are more likely than those with a college degree to prefer a group setting when learning more about educational travel opportunities (52% vs. 40%).
- Respondents with some college are more likely than those with a high school education or less to express a preference for learning more about understanding and getting along with others in a group setting (67% vs. 55%).

Income. For 2 of 17 topics, those at higher income levels prefer group learning formats for personal topics – a pattern different from the general preference for individual formats for personal topics and group learning formats for topics concerning relations with the larger community:

- Over half (52%) of those in the highest income category (\$75,000 or more) prefer group learning formats when mastering an advanced skill. In contrast, over half of those with annual incomes less than \$50,000 (55%) or with incomes between \$50,000 and \$75,000 (53%) prefer to learn about the same topic in an individualized setting.
- Half or more of those in the two lower-income groups prefer a group format when learning about educational travel opportunities (50% for those with incomes between \$50,000 and \$75,000 and 57% for those with incomes of \$75,000 or more) compared to 35% of those with incomes less than \$50,000).

Gender. Men and women are remarkably similar in their preferred learning formats (Table A20 and Table A21, Appendix A). There are only three topics for which men and women prefer different settings:

- Women are more likely than men to prefer a group setting (a classroom, workshop, or group) when learning about basic life skills (49% vs. 33%) or when learning about their hobbies or pastimes (48% vs. 31%).
- In contrast, men are more likely than women to prefer to learn about arts and culture in an individualized setting such as by teaching themselves or on the Internet (45% vs. 34%).

Age. Younger respondents express a different learning format preference than older respondents for only two topics:

- Respondents age 50-59 are more likely than those age 60 – 74 to say they would like to learn more about understanding and getting along better with others in a group setting (67% vs. 54%).
- When learning more about their spiritual or personal growth, respondents age 50-59 are more likely to prefer an individual setting than are those age 75 or older (48% vs. 27%).

Investment of Time

About one-half (47%) of all respondents say they are willing to invest some time to learn if they can control when and how much (Table A7, Appendix A).

Education. Those with a high school education or less are more likely than those with some college or with a college education or higher to say that they cannot spend much time (9% vs. 6% for those with some college and 3% for college graduates).

Income. Likewise, those with incomes less than \$50,000 are more likely than those with incomes between \$50,000 and \$75,000 or \$75,000 or more to say they cannot spend much time to learn something (9% vs. 2% and 3%). Further, those with incomes of \$75,000 or more are more likely than those in the middle-income category (\$50,000 to \$75,000) to say they will spend all the time it takes to learn about something they really want to know (38% vs. 26%). Those with incomes of \$50,000 to \$75,000 are more likely than those with

incomes less than \$50,000 to say they will spend some time, if they can control when and how much (56% vs. 46%).

Gender. Men and women do not differ in regard to the time investment they will make to learn about something (Table A16, Appendix A).

Age. Respondents age 75 or older are more likely than respondents in the other two age categories to say they cannot spend much time to learn about something they really want to know about (14% vs. 4% for those 50-59 and 8% for those 60-74).

Financial Investment

Education. Adults with a college or post-graduate education are willing to spend almost twice as much money as those with less than a college degree to learn about something they are extremely interested in or have always wanted to learn about (median investment: \$197 vs. \$106 some college and \$100 high school or less: Table A8, Appendix A).

Income. Further, respondents with higher incomes are also willing to spend more money on learning. The typical adult age 50 or older with an income of more than \$75,000 is willing to spend \$170 – more than one and one-half times the amount that those with lower household incomes are willing to spend (\$102: Table A8, Appendix A).

These findings are not surprising as education and income are closely related. Those with higher levels of education are more likely to have higher incomes and are, therefore, better able to make a larger financial investment in learning. Respondents show no gender or age differences in the median financial investment they are willing to make (Table A18, Appendix A).

CHAPTER THREE: INCIDENCE AND IMPACT OF MAJOR LIFE EVENTS

Adults age 50 and older were asked about a variety of different life events and how these events have affected their lives within the past 12 months. An objective of this study is to explore the relationship between life stage context and learning among older adults. This exploration assumes that within each stage of the life course, different environmental events influence both short- and long-term developmental processes and outcomes, such as learning, for adults. We describe here the reported incidence and impact of major life events.

In addition to questions about learning, respondents were asked if they had experienced major life changes within the past 12 months. These events included going back to school, experiencing a personal illness or illness in the family, making lifestyle changes, and having a death in the immediate family. If respondents experienced these events, they were asked to rate the effect on their life.

Four in ten adults age 50 and older report a change in diet or level of physical activity—the most common of all events about which we asked. A sizable minority (40%) of those who experienced this change say it had a major impact on their lives. Fewer people experienced other events, but they reported those experiences had a greater impact on their lives than dietary or physical activity changes (Table A22, Appendix A).

Three events touch roughly one-quarter to one-third of adults 50 and older and have a major effect on at least half of the adults who experience them (Table A22, Appendix A).

- Having a major illness in the immediate family, but not including the respondent (34% of adults age 50 and older have experienced this, of which 56% report this event had a major effect on their lives)
- Having a death in the immediate family (26% of adults age 50 and older have experienced this, and 56% of those report this event had a major effect on their lives)
- Becoming a caregiver for a parent or elderly family member (18% have experienced this of which 50% report this experience had a major effect on their lives)

Events occurring still less frequently but with major impact include:

- Becoming a caregiver for a child or grandchild (16% of adults age 50 and older have experienced this, of which 42% report that it had a major effect on their lives)
- Retiring for the first time (14% experienced this, of which 42% report it had a major effect on them)

Education and Income. Those with less education and income are more likely to have experienced three life events:

- Having a death in the immediate family (29% of those with a high school or less education and 25% of those with some college versus 19% of those with at least a college degree)(Table A23, Appendix A)
- Becoming a caregiver for a child or grandchild (18% of those with high school or less education and 15% of those with some college versus 10% of those with a college degree or higher)(Table A24, Appendix A)
- Becoming a grandparent (33% of those with the least education and 28% of those with some education versus 17% of those with a college degree or higher)(Table A27, Appendix A)

Those with higher educational status are more likely to have experienced three life events:

- Had a child go to college (16% college graduates versus 12% with some college)(Table A23, Appendix A)
- Received a degree, diploma, or certification (12% of those with some college and 13% of those with a college or higher degree versus 5% of those with a high school or less education)(Table A28, Appendix A)
- Gone back to school to finish a degree or certification or to get an advanced degree or certification (10% of those with some college and those with at least a college degree versus 3% of those with a high school or less degree)(Table A29, Appendix A)

Those with lower incomes are more likely to have experienced three life events:

- Becoming a grandparent (34% of those with less than \$50,000 in household income versus 25% of those with household incomes between \$50,000 and \$75,000 and 20% of those with incomes above \$75,000)(Table A27, Appendix A)
- Having a death in the immediate family (29% of those with less than \$50,000 in household income versus 20% of those with \$75,000 or more in household income)(Table A23, Appendix A)
- Received a degree, diploma, or certification (11% of those with household incomes of \$75,000 or more versus 6% of those with household incomes less than \$50,000)(Table A28, Appendix A)

In contrast, those with higher income are more likely to have had a child go to college (21% of those with \$75,000 or more in household income versus 10% of those with less than \$50,000 in household income and 12% of those with household incomes between \$50,000 and \$75,000)(Table A23, Appendix A).

These data for education and income suggest that individuals with less education and income may experience certain events (such as caregiving or overcoming a death in the family) as more stressful events than those with more education and income.

Gender. Women are more likely than men to have experienced a death in their immediate family (31% versus 21%) and to have become a caregiver for a parent or elderly family member (22% versus 14%). Men, on the other hand, are more likely to report that they have had a child go to college (16% of men versus 9% of women)(Tables A30 and A31, Appendix A).

Age. Adults age 50 – 59 are very involved with their families and continue to pursue new accomplishments as evidenced by their life experiences relative to their older counterparts. They are more likely to have:

- Become a caregiver for a child or grandchild (19% of those age 50 – 59 vs. 14% of those age 60 – 74 and 13% of those age 75 and older)(Table A31, Appendix A)
- Had a child go to college (18% of those age 50 – 59 vs. 10% of those age 60 – 74 and 5% of those who are 75 or older)(Table A30, Appendix A)
- Had their last child move out of their home (15% of those age 50 – 59 vs. 10% of those 60 – 74 and 7% of those age 75 or older)(Table A32, Appendix A)
- Had an adult child move back into their home (15% of those age 50 – 59 vs. 9% of those age 60 – 74 and 6% of those age 75 or older)(Table A32, Appendix A)
- Received a degree, diploma or certification (10% of respondents age 50 – 59 vs. 6% of respondents age 60 – 74)(Table A35, Appendix A)
- Gone back to school to finish a degree or certification or to get an advanced degree or certification (9% of those age 50 – 59 vs. 4% of those age 60 – 74 and 3% of those age 75 or older)(Table A36, Appendix A)

As one might expect, adults age 60 to 74 are more likely than those 50 to 59 years old to have retired for the first time in the past year (19% versus 9%)(Table A33, Appendix A).

CHAPTER FOUR: TELEPHONE VERSUS ONLINE INTERVIEWING

Online respondents are more likely than those interviewed by telephone to use the Internet for searching for information about what they want to learn about. Both groups agree, however, that first-hand experience is the best way they learn about something. Knowing what is going on in the world around them is the primary motivation for learning for both telephone and online respondents. Online respondents more often prefer individual learning environments, are more likely to want to use their newly acquired skills, and are more eager to want to learn about their favorite hobby or an advanced skill immediately.

This chapter explores the similarities and differences between those who were interviewed by telephone and those who were interviewed via the Internet. Since both samples were balanced demographically to match the national population, any remaining differences between them are probably not attributable to demographic characteristics. Gaps that continue to exist may be the result of actual differences between the two populations, differences in sampling, differences in interviewing methods, or even some interaction between these things. Without additional analyses, it is impossible to be certain.⁹

Ways Older Adults Typically Learn

Regardless of whether they were interviewed by telephone or via the Internet, respondents express a strong preference for learning by reading newspaper or magazine articles, books, or journals (Table A37, Appendix A). However, adults interviewed via the Internet are even more likely than those interviewed by telephone to say they learn using these media always or most of the time (68% vs. 60%). Not surprisingly, respondents who were interviewed over the Internet are also more likely than those interviewed by phone to say that they always or most of the time learn by "searching the Internet" (56% vs. 14%) or "buying or borrowing computer-based tutorials" (16% vs. 7%). The 42% difference between Internet and phone samples on "searching the Internet" is the largest difference noted between the two samples. The difference is even

⁹ Appendix C contains annotated questionnaires for the telephone and online data combined and separately.

more dramatic when we add the other positive response category “some of the time” to the above percentage totals for each sample. When we do, 97% of the Internet sample and 33% of the phone sample “search the Internet” to learn at least some of the time.

Best Ways to Learn

Respondents are uniform in their agreement that the two “best” ways to learn are by putting their hands on something and figuring it out; or by watching, listening, and then thinking. Roughly nine out of ten respondents mention both of these learning methods (Table A38, Appendix A).

Telephone respondents are more likely than those who responded by Internet to strongly or somewhat agree that they learn best when using four methods:

- In a group where they can share with other learners (74% of phone respondents vs. 61% of online respondents)
- With an instructor, guide, tutor, or mentor in a face-to-face situation (82% vs. 73%)
- By watching, listening, and then thinking (93% vs. 88%)
- In a formal teacher-classroom setting (59% vs. 48%)

Why Older Adults Want to Learn

Older adults overall, regardless of the interviewing method, overwhelmingly agree that they want to learn for three reasons:

- To keep up with what’s going on in the world (94% of phone respondents and 93% of online respondents)
- For the simple joy of learning something new (90% and 93%)
- For their own spiritual or personal growth (93% and 89%)(Table A39, Appendix A)

However, respondents who were interviewed by telephone are more likely than those who responded to the survey via the Internet to strongly or somewhat agree that they want to learn for eight of the thirteen reasons about which they were asked. Telephone respondents are more likely than online respondents to say they want to learn for these reasons:

- To help other people (88% vs. 75%)
- To better manage their everyday lives (88% vs. 81%)
- To understand and get along better with others (86% vs. 70%)
- To talk about things with their children and grandchildren (85% vs. 75%)
- To understand themselves better (80% vs. 67%)
- To give back something to their community (78% vs. 52%)
- To know the basic skills they need everyday (68% vs. 58%)
- To earn a degree or certification that will advance their career or allow them to make more money (35% of phone respondents vs. 26% of online respondents)

Given the number and direction (the telephone sample always responding with higher agreement than the online sample) of significant differences between telephone and online respondents regarding their motivations to learn, it seems reasonable to assume that some of these differences are attributable to differences in the interviewing method rather than to real differences between the respondents themselves. Other mixed-mode surveys also show this response pattern where telephone responders are more in agreement with certain items than those responding to Internet and mail questionnaires.¹⁰

When Older Adults Want to Use What They Learn

Adults age 50 and older who responded online are much more likely than those who responded by telephone to say they would like to use what they have learned immediately or very soon after they have learned it (64% vs. 45%).

Interest in Various Subjects

The largest percentage of older adults interviewed by telephone or via the Internet say they are extremely or very interested in learning about their favorite hobby or pastime (Table A40, Appendix A). Notably, however, respondents answering online are considerably more likely to express this level of interest in this topic than are those interviewed by telephone (72% vs. 51%).

The only other topic garnering this much interest among online respondents is how to

¹⁰ Dillman, D.A. (2000). *Mailed and Internet Surveys: The Tailored Design Method*, 2nd Edition. New York: Wiley.

master an advanced skill. Seven in ten online respondents (70%) say they are extremely or very interested in using a computer, becoming fluent in a foreign language, or preparing taxes. In sharp contrast, half as many telephone respondents note the same level of interest in mastering such advanced skills (34%).

Adults interviewed via the Internet are also more likely than those interviewed by telephone to say they are extremely or very interested in learning about five topics:

- Getting more enjoyment or pleasure out of life (55% of online respondents vs. 47% of telephone respondents)
- Weight control (47% of online respondents vs. 37% of telephone respondents)
- Educational travel opportunities (38% of online respondents vs. 23% of telephone respondents)
- Alternative medicines (38% of online respondents vs. 25% of telephone respondents)
- Arts and culture (35% of online respondents vs. 25% of telephone respondents)

One possible explanation for these differences is that adults who are online may not only be generally more innovative in their learning tools but also more interested in learning about new and different things rather than solidifying their current skill base.

Preferred Learning Formats

Generally, online respondents who express an interest in various topics are more apt than are telephone respondents to say they prefer to learn it in an individual-based environment. In contrast, telephone respondents generally express a preference for learning in a group setting (Table A41 and Table A42, Appendix A).

Consistent with this pattern, telephone respondents are more likely than online respondents to say they prefer a group setting, such as a classroom, workshop, or group, to learn about five of the 17 surveyed topics:

- Spiritual or personal growth (59% of telephone respondents vs. 46% of online respondents)
- More enjoyment out of life (56% of telephone respondents vs. 45% of online respondents)
- Advanced skills (54% of telephone respondents vs. 42% of online respondents)

- Weight control (46% of telephone respondents vs. 33% of online respondents)
- Their health status (46% of telephone respondents vs. 31% of online respondents)

Further, the preference for individually-based learning environments among online respondents is especially pronounced for ten of the subjects:

- Their health status (69% of online respondents vs. 50% of telephone respondents)
- Alternative medicines (65% of online respondents vs. 48% of telephone respondent)
- Weight control (64% of online respondents vs. 47% of telephone respondents)
- Hobbies or pastimes (63% of online respondents vs. 48% of telephone respondents)
- Stress management (61% of online respondents vs. 47% of telephone respondent)
- Advanced skills (58% of online respondents vs. 45% of telephone respondents)
- Career advancement (57% of online respondents vs. 41% of telephone respondents)
- More enjoyment from life (52% of online respondents vs. 36% of telephone respondents)
- Spiritual or personal growth (51% of online respondents vs. 32% of telephone respondents)
- Arts and culture (45% of online respondents vs. 29% of telephone respondents)

One possible explanation for these findings may be that adults who are online and who use a computer either have grown accustomed to—or were already inclined to opt for—individually-based learning formats.

Investment of Time

Control over the amount of time learning takes is important to all adults. Roughly equal proportions of those who were interviewed by either method say they would spend some time learning if they could control when and how much (50% of phone respondents and 45% of online respondents: Table A43, Appendix A). Adults who responded online, however, are more likely than those who responded by phone to state that they would spend all the time it takes to learn about something that they really want to know (38% vs. 21%).

In contrast, those who responded by phone are more likely than those who responded online to say they cannot spend much time in learning (12% vs. 2%), even though the overall percentage is much lower than for the other response options.

Financial Investment

Respondents, whether interviewed by phone or via the Internet, are typically willing to spend a maximum of \$101 to learn about something in which they are extremely interested or about which they have always wanted to learn more. However, those interviewed via the Internet are more likely than those interviewed by phone to say they are willing to spend between \$1 and \$99 (33% vs. 13%), between \$100 and \$499 (33% vs. 15%), or between \$500 and \$1999 (13% vs. 7%) (Table A44, Appendix A).¹¹

¹¹ Note that the median is based on those giving a dollar figure. The percentage responding in each dollar range is based on the total sample including those “not sure/refused.”

APPENDIX A
TABLES

How to Read a Table: Table values represent percentages (%). Subscripts indicate column differences. For example, in Table A4 (Question 21B), 22_A in column B indicates a percentage that is significantly ($p < .05$) higher than the percentage in column A. That is to say, 95 times out of 100, this difference would not have happened by chance.

Table A1
Degree of Interest in Learning Various Skills

		<u>Extremely interested</u>	<u>Very interested</u>	<u>Somewhat interested</u>	<u>Not very interested</u>	<u>Not at all interested</u>
A. Having a healthy diet and nutrition	%	22	28	34	9	7
B. Exercise and fitness	%	15	24	37	14	10
C. Weight control	%	19	23	31	13	13
D. How to manage stress	%	22	25	29	15	9
E. How to measure your own personal health status	%	19	28	34	11	6
F. Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy	%	14	17	30	19	19
G. How to get ahead in your job or career, or how to find a new one	%	10	11	21	21	35
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	%	24	28	24	9	14
I. Basic life skills, such as reading, writing, or basic math or learning to drive	%	9	11	22	24	32
J. Your favorite hobby or pastime	%	28	33	26	7	5
K. How to give back or get involved in your local community	%	8	16	41	21	13
L. How to become a volunteer in your community	%	6	11	38	26	18
M. More about arts and culture, or other personal enrichment opportunities	%	13	17	35	22	12
N. How to get more enjoyment or pleasure out of life	%	22	29	32	11	6
O. Educational travel opportunities	%	13	17	29	21	18
P. More about spiritual or personal growth	%	20	23	32	15	10
Q. More about understanding and getting along with others	%	15	24	41	13	7

Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...

Base: All respondents (n=1019)

Table A2
Preferred Format in Which to Learn about Desired Skills

		<u>Class-</u> <u>room</u>	<u>Work-</u> <u>shop</u>	<u>Group</u>	<u>Tutor/</u> <u>pro</u>	<u>Teaching</u> <u>yourself</u>	<u>Self</u> <u>study</u>	<u>Internet</u>	<u>Some-</u> <u>thing</u> <u>else</u>
A. Having a healthy diet and nutrition (n=503)	%	7	12	14	9	28	13	14	3
B. Exercise and fitness (n=399)	%	7	11	22	14	24	10	8	3
C. Weight control (n=430)	%	6	12	21	12	24	11	10	5
D. How to manage stress (n=470)	%	7	16	19	10	20	13	11	4
E. How to measure your own personal health status (n=486)	%	7	16	16	16	19	11	14	2
F. Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy (n=321)	%	10	14	15	14	13	14	17	3
G. How to get ahead in your job or career, or how to find a new one (n=214)	%	10	23	12	13	12	10	15	5
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes (n=532)	%	23	17	6	21	14	9	10	1
I. Basic life skill, such as reading, writing, or basic math or learning to drive (n=205)	%	23	8	10	16	22	10	4	8
J. Your favorite hobby or pastime (n=630)	%	5	20	14	10	27	9	11	4
K. How to give back or get involved in your local community (n=241)	%	4	30	35	3	8	7	5	7
L. How to become a volunteer in your community (n=172)	%	4	27	40	3	11	2	4	8

(Cont'd)

Table A2 (Cont'd)
Preferred Format in Which to Learn about Desired Skills

		<u>Class-</u> <u>room</u>	<u>Work-</u> <u>shop</u>	<u>Group</u>	<u>Tutor/</u> <u>pro</u>	<u>Teaching</u> <u>yourself</u>	<u>Self</u> <u>study</u>	<u>Internet</u>	<u>Some-</u> <u>thing</u> <u>else</u>
M. More about arts and culture, or other personal enrichment opportunities (n=304)	%	12	24	20	4	14	7	12	6
N. How to get more enjoyment or pleasure out of life (n=522)	%	4	18	28	6	19	12	8	5
O. Educational travel opportunities (n=309)	%	8	19	19	7	11	8	25	3
P. More about spiritual or personal growth (n=432)	%	7	13	32	7	17	12	5	6
Q. More about understanding and getting along with others (n=388)	%	7	19	34	6	17	9	5	4

Q116. If you wanted to learn more about ..., which of the following formats would you MOST PREFER to use to learn about it?

Base: Extremely/very interested in topic

Table A3
Preference for Group versus Individual Learning Formats

	<u>Base</u>		<u>Group</u>	<u>Individual</u>	<u>Gap</u>
A. Having a healthy diet and nutrition	503	%	33	64	+31
B. Exercise and fitness	399	%	41	56	+15
C. Weight control	430	%	39	56	+17
D. How to manage stress	470	%	41	54	+13
E. How to measure your own personal health status	486	%	38	60	+22
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy	321	%	39	58	+19
G. How to get ahead in your job career, or how to find a new one	214	%	45	50	+5
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language or preparing taxes	532	%	46	53	+7
I. Basic life skill, such as reading, writing, or basic math or learning to drive	205	%	41	52	+11
J. Your favorite hobby or pastime	630	%	40	57	+17
K. How to give back or get involved in your local community	241	%	69	24	-45
L. How to become a volunteer in your community	172	%	71	21	-50
M. More about arts and culture, or other personal enrichment	304	%	56	38	-18

(Cont'd)

Table A3 (Cont'd)
Preference for Group versus Individual Learning Formats

	<u>Base</u>		<u>Group</u>	<u>Individual</u>	<u>Gap</u>
N. How to get more enjoyment or pleasure out of life	522	%	50	45	-5
O. Educational travel opportunities	309	%	46	51	+5
P. More about spiritual or personal growth	432	%	53	41	-12
Q. More about understanding and getting along with others	388	%	60	37	-23

Q116. If you wanted to learn more about.... which of the following formats would you most prefer to use to learn about it.

Base: Extremely/Very interested in topic

Note: Group learning consists of those saying they preferred classroom, workshops or group. Individual consists of those saying they preferred tutor or professional, teaching yourself, self study courses, or the Internet.

Table A4
Ways Older Adults Learn by Education and Income

		Always/Most of the Time (net)					
		Education			Income		
	<u>Total</u>	H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	\$50k to <u>\$75k</u>	\$75k or <u>more</u>
		A	B	C	D	E	F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
When I want or need to learn something I:							
A. Find someone to teach me who knows about the topic, such as a friend, co-worker, family member	41	46 ^{BC}	37	33	43 ^F	41	39
B. Take classes or attend community seminars or workshops	18	13	22 ^A	27 ^A	17	18	22
C. Look for educational or informational television or radio programs	26	27	25	23	32 ^{EF}	18	14
D. Read newspaper articles, magazine articles, books, or journals	64	61	65	73 ^{AB}	65	66	63
E. Search the Internet for information	35	33	37	41 ^A	35	39	41
F. Buy, rent, or borrow audio or video tapes	9	9	11	7	11 ^E	5	7
G. Buy or borrow computer-based teaching programs (tutorials)	12	11	14	10	13	10	12
H. Start by doing what I want to learn about and learn from my mistakes and successes	44	44	45	39	48 ^F	40	36

Table A4 (Cont'd)
Ways Older Adults Learn by Education and Income
 Always/Most of the Time (net)

	<u>Total</u>	<u>Education</u>			<u>Income</u>		
		<u>H.S. or less</u> A	<u>Some college</u> B	<u>College grad or higher</u> C	<u>Less than \$50</u> D	<u>\$50k to \$75k</u> E	<u>\$75k or more</u> F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
I. Find a public event, exposition, or exhibition featuring what I want to learn about	15	15	13	16	16	16	14
J. Enroll in a college or community college to take classes	10	7	13 _A	14 _A	10	11	12
K. Find a tutor or professional to teach me	11	11	9	11	12	9	9
L. Find an online or chat group interested in a topic	10	10	10	8	9	6	14 _E
M. Get involved in a community group or volunteer organization that focuses on what I want to learn about	12	12	9	12	13	14 _F	7

Q21. For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way.

Base: All respondents

Table A5
Best Ways to Learn by Education and Income

Strongly Agree/Somewhat Agree (net)

	<u>Total</u>	Education			Income		
		H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	\$50k to <u>\$75k</u>	\$75k or <u>more</u>
		A	B	C	D	E	F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
I learn best...							
A. In a group where I can share with other learners	68	68	69	64	67	64	68
B. When I have a guide, instructor, tutor, or mentor in a face-to-face situation	78	78	80	75	77	78	79
C. By putting my hands on something and playing with it or figuring it out	90	90	91	89	91	92	90
D. By watching or listening and then thinking about it	90	92 _C	91 _C	86	91	91	87
E. In a formal teacher-classroom situation	53	49	57 _A	60 _A	53	50	59
F. By gathering as much information as I can find and then teaching myself	83	85	83	81	86	79	82
G. By finding self-study courses that let me set my own objectives and then moving at my own pace	69	69	74 _C	63	74 _F	68	59

Q71. These next few statements focus on the best ways for you, personally, to learn. Please tell us if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with them.

Base: All respondents

Table A6
Why Older Adults Want to Learn by Education and Income

Strongly Agree/Somewhat Agree (net)

	<u>Total</u>	<u>Education</u>			<u>Income</u>		
		<u>H.S. or less</u>	<u>Some college</u>	<u>College grad or higher</u>	<u>Less than \$50k</u>	<u>\$50k to \$75k</u>	<u>\$75k or more</u>
Base:	1019	586	213	213	552	145	197
		A	B	C	D	E	F
	%	%	%	%	%	%	%
I want to learn...							
A. So I can improve my job skills to make work easier or to get ahead	55	52	59 _A	60 _A	51	67 _D	63 _D
B. So I can earn a degree or certification that will advance my career to help me earn more money	31	27	37 _A	35 _A	28	35	38 _D
C. So I can enjoy my hobbies or recreational activities better	86	86	85	91 _B	85	91	89
D. So I can manage my everyday life better	84	84	87	84	86	88	83
E. So I know the basic skills I need every day, such as reading, writing, basic math, or learning how to drive	63	67 _C	63 _C	52	66	62	58
F. For the simple joy of learning something new	91	91	92	91	92	94	93
G. So I can give back something to my community	65	61	72 _A	69 _A	65	68	63
H. So I can understand myself better	73	74	75	70	76	70	73
I. So I can understand and get along with others better	78	78	82 _C	75	80	81	74

(Cont'd)

Table A6 (Cont'd)
Why Older Adults Want to Learn by Education and Income

Strongly Agree/Somewhat Agree (net)

	<u>Total</u>	<u>Education</u>			<u>Income</u>		
		H.S. or <u>less</u> A	Some <u>college</u> B	College grad or <u>higher</u> C	Less than <u>\$50k</u> D	\$50k to <u>\$75k</u> E	\$75k or <u>more</u> F
Base:	1019	586	213	213	552	145	197
J. So I can help other people	82	79	86 _A	83	83	80	81
K. So I can keep up with what's going on in the world	93	92	94	95	94	93	95
L. So I can talk about things with my children or grandchildren	80	82 _C	80	74	84 _{EF}	76	75
M. For my own spiritual or personal growth	91	91	92	92	93 _E	88	91

Q51. These next statements describe why you want to learn. Tell us whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each one.

Base: All respondents

Table A7
Time Investment by Education and Income

	<u>Total</u>	<u>Education</u>			<u>Income</u>		
		<u>H.S. or less</u>	<u>Some college</u>	<u>College grad or higher</u>	<u>Less than \$50k</u>	<u>\$50k to \$75k</u>	<u>\$75k or more</u>
		A	B	C	D	E	F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
I will spend all the time it takes to learn about something I really want to know	30	28	32	32	29	26	38 _E
I will spend some time, if I can control when and how much	47	45	49	53	46	56 _D	49
I will spend some time even if I cannot control when and how much	7	8	5	8	7	8	6
I can't spend much time to learn about something I really want to know	7	9 _C	6	3	9 _{EF}	2	3
It depends	7	8	7	4	7	6	4
Don't know	1	1	1	*	1	1	*
Refused	1	1	*	*	1	*	-

Q200. Which of the following four statements best describes how much time you are willing to invest?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half percent (0.5%). A dash (-) represents a value of zero.

Table A8
Financial Investment by Education and Income

	<u>Total</u>	<u>Education</u>			<u>Income</u>		
		<u>H.S. or less</u>	<u>Some college</u>	<u>College grad or higher</u>	<u>Less than \$50K</u>	<u>\$50K to \$75K</u>	<u>\$75K or more</u>
		A	B	C	D	E	F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
\$0	16	20 _{BC}	13 _C	7	18 _{EF}	10	9
\$1-\$99	23	26 _C	22	18	26	23	21
\$100-\$499	24	21	26	31 _A	24	30	27
\$500-\$1999	10	5	13 _A	19 _{AB}	6	16 _D	18 _D
\$2000+	4	2	4	10 _{AB}	3	3	10 _{DE}
Mean	\$520	\$310	\$460	\$974 _{AB}	\$372	\$399	\$981 _E
Median	\$101	\$100	\$106 _A	\$197 _{AB}	\$102	\$102 _D	\$170 _{DE}
Don't know	19	20	19	15	19	17	12
Refused	4	5 _C	3 _C	*	4	2	2

Q205. How much would you be willing to pay, AT MOST, to learn about something you are extremely interested in or have always wanted to learn more about?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half percent (0.5%). A dash (-) represents a value of zero.

Table A9
When Older Adults Want to Use What They Learn by Education and Income

	<u>Total</u>	<u>Education</u>			<u>Income</u>		
		<u>H.S. or less</u>	<u>Some college</u>	<u>College grad or higher</u>	<u>Less than \$50</u>	<u>\$50k to \$75k</u>	<u>\$75k or more</u>
		A	B	C	D	E	F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
I want to use what I learn immediately or very soon after I learn it	55	57 _C	55	48	56	55	56
I am willing to wait to use what I learn some time in the near future	28	26	30	32	27	31	28
I am willing to wait to use what I learn for a long period of time	14	14	12	16	15	11	11
Don't know	3	2	2	4	2	2	4
Refused	1	1	1	*	1	-	*

Q60. Which of the following statements best describes WHEN you want to use what you learn.

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half percent (0.5%). A dash (-) represents a value of zero.

Table A10
Strong Interest in Learning Various Skills by Education and Income

Extremely/Very Interested (Net)

	Total	Education			Income		
		H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	\$50k to <u>\$75k</u>	\$75k or <u>more</u>
		A	B	C	D	E	F
Base:	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
A. Having a healthy diet and nutrition	49	50	50	46 _{AB}	49	50	49
B. Exercise and fitness	39	37	37	46 _{AB}	39	43	44
C. Weight control	42	43	43	39	44	43	43
D. How to manage stress	46	49 _C	44	40	48	45	46
E. How to measure your own personal health status	48	48	49	47	48	52	47
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy	32	31	36 _C	28	35	31	27
G. How to get ahead in your job or career, or how to find a new one	21	20	22	22	19	23	25
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	52	48	56 _A	60 _A	51	57	60

(Cont'd)

Table A10 (Cont'd)
Strong Interest in Learning Various Skills by Education and Income

	Total	Extremely/Very Interested (Net)					
		Education			Income		
		H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	<u>\$50k</u> to <u>\$75k</u>	<u>\$75k</u> or <u>more</u>
	A	B	C	D	E	F	
I. Basic life skills, such as reading, writing, or basic math or learning to drive	20	22	18	16	21	19	19
J. Your favorite hobby or pastime	62	58	66 _A	68 _A	60	63	70 _D
K. How to give back or get involved in your local community	24	20	28 _A	28 _A	23	22	25
L. How to become a volunteer in your community	17	15	19	20	17	20	17
M. More about arts and culture, or other personal enrichment	30	21	37 _A	47 _{AB}	27	31	39 _D
N. How to get more enjoyment or pleasure out of life	51	51	52	52	50	56	55
O. Educational travel opportunities	30	24	35 _A	43 _{AB}	25	36 _D	46 _D
P. More about spiritual or personal growth	42	41	45	43	43	45	37
Q. More about understanding and getting along with others	38	38	41	34	40	38	35

Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...

Base: All respondents

Table A11
Prefer Group Learning Format by Education and Income

(% saying classroom, workshops, or group)

	<u>Total</u>	Education			Income		
		H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	\$50k to <u>\$75k</u>	\$75k or <u>more</u>
	%	A	B	C	D	E	F
A. Having a healthy diet and nutrition (n=503)	33	27	39 _A	43 _A	33	38	32
B. Exercise and fitness (n=399)	41	37	42	47	40	45	39
C. Weight control (n=430)	39	40	35	40	41	35	37
D. How to manage stress (n=470)	41	39	38	52 _{AB}	40	40	39
E. How to measure your own personal health status (n=486)	38	40	37	37	39	39	34
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy (n=321)	39	35	42	47	41	48 _F	27
G. How to get ahead in your job or career, or how to find a new one (n=214)	45	42	55	42	43	53	39
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language or preparing taxes (n=532)	46	41	48	55 _A	44	47	52
I. Basic life skill, such as reading, writing, or basic math or learning to drive (n=205)	41	37	45	53	42	46	45
J. Your favorite hobby or pastime (n=630)	40	37	44	42	38	38	42
K. How to give back or get involved in your local community (n=241)	69	65	75	73	67	74	69

(Cont'd)

Table A11 (Cont'd)
Prefer Group Learning Format by Education and Income

(% saying classroom, workshops, or group)

	<u>Total</u>	Education			Income		
		H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	\$50k to <u>\$75k</u>	\$75k or <u>more</u>
		A	B	C	D	E	F
L. How to become a volunteer in your community (n=172)	71	69	75	71	66	77	78
M. More about arts and culture, or other personal enrichment (n=304)	56	55	59	56	61	56	52
N. How to get more enjoyment or pleasure out of life (n=522)	50	47	54	53	49	50	53
O. Educational travel opportunities (n=309)	46	46	52 _C	40	50 _F	57 _F	35
P. More about spiritual or personal growth (n=432)	53	50	57	55	51	58	52
Q. More about understanding and getting along with others (n=388)	60	55	67 _A	65	60	65	60

Q116. If you wanted to learn more about... which of the following formats would you most prefer to use to learn about it.

Base: Extremely/Very interested in topic

NOTE: Number of cases for total sample are given beside each item.

Table A12
Prefer Individual Learning Format by Education and Income

(% saying tutor, teaching yourself, self-study, or Internet)

	<u>Total</u>	Education			Income		
		<u>H.S. or less</u>	<u>Some college</u>	<u>College grad or higher</u>	<u>Less than \$50</u>	<u>\$50k to \$75k</u>	<u>\$75k or more</u>
		A	B	C	D	E	F
	%	%	%	%	%	%	
A. Having a healthy diet and nutrition (n=503)	64	69 ^{BC}	58	56	64	59	68
B. Exercise and fitness (n=399)	56	59	54	51	56	48	60
C. Weight control (n=430)	56	55	58	59	54	57	62
D. How to manage stress (n=470)	54	55	60 ^C	47	56	56	60
E. How to measure your own personal health status (n=486)	60	58	59	62	59	58	66
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy (n=321)	58	60	57	52	56	51	73 ^{DE}
G. How to get ahead in your job or career, or how to find a new one (n=214)	50	52	44	55	49	47	60
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language or preparing taxes (n=532)	53	58 ^C	51	45	55	53	48
I. Basic life skill, such as reading, writing, or basic math or learning to drive (n=205)	52	56	49	37	50	51	49
J. Your favorite hobby or pastime (n=630)	57	58	54	57	59	59	56
K. How to give back or get involved in your local community (n=241)	24	26	23	18	26	22	22

(Cont'd)

Table A12 (Cont'd)
Prefer Individual Learning Format by Education and Income

(% saying tutor, teaching yourself, self-study or Internet)

	<u>Total</u>	Education			Income		
		H.S. or <u>less</u>	Some <u>college</u>	College grad or <u>higher</u>	Less than <u>\$50</u>	\$50k to <u>\$75k</u>	\$75k or <u>more</u>
		A	B	C	D	E	F
	%	%	%	%	%	%	%
L. How to become a volunteer in your community. (n=172)	21	21	23	22	23	20	19
M. More about arts and culture, or other personal enrichment. (n=304)	38	40	37	37	35	38	42
N. How to get more enjoyment or pleasure out of life. (n=522)	45	46	44	45	47	49	43
O. Educational travel opportunities. (n=309)	51	52	46	54	48	43	60 _E
P. More about spiritual or personal growth. (n=432)	41	42	39	42	43	39	46
Q. More about understanding and getting along with others. (n=388)	37	40	31	34	36	35	40

Q116. If you wanted to learn more about which of the following formats would you most prefer to use to learn about it.

Base: Extremely/Very interested in topic

NOTE: Number of cases for total sample are given beside each item.

Table A13
Ways Older Adults Learn by Gender and Age

Always/Most of the Time (net)

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 - 59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
When I want or need to learn something I:						
A. Find someone to teach me who knows about the topic, such as a friend, co-worker, family member	41	41	42	46 _D	37	41
B. Take classes or attend community seminars or workshops	18	17	19	19	17	18
C. Look for educational or informational television or radio programs	26	21	31 _A	23	29	27
D. Read newspaper articles, magazine articles, books, or journals	64	62	66	57	70 _C	65
E. Search the Internet for information	35	36	35	38 _E	37 _E	24
F. Buy, rent, or borrow audio or video tapes	9	9	9	8	11	5
G. Buy or borrow computer-based teaching programs (tutorials)	12	13	10	11	12	11
H. Start by doing what I want to learn about and learn from my mistakes and successes	44	44	44	41	44	52 _C
I. Find a public event, exposition, or exhibition featuring what I want to learn about	15	15	16	16	15	14

(Cont'd)

Table A13 (Cont'd)
Ways Older Adults Learn by Gender and Age

Always/Most of the Time (net)

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 - 59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
J. Enroll in a college or community college to take classes	10	9	10	11	10	9
K. Find a tutor or professional to teach me	11	9	12	10	10	17 _D
L. Find an online or chat group interested in a topic	10	11	9	11	10	7
M. Get involved in a community group or volunteer organization that focuses on what I want to learn about	12	10	14	12	12	11

Q21. For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way.

Base: All respondents

Table A14
Best Ways to Learn by Gender and Age

Strongly Agree/Somewhat Agree (net)

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 - 59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
I learn best...						
A. In a group where I can share with other learners	68	64	70	70 _E	69 _E	58
B. When I have a guide, instructor, tutor, or mentor in a face-to-face situation	78	77	78	81 _E	78 _E	67
C. By putting my hands on something and playing with it or figuring it out	90	93 _B	87	90	90	89
D. By watching or listening and then thinking about it	90	91	90	90	90	93
E. In a formal teacher-classroom situation	53	52	55	57	51	52
F. By gathering as much information as I can find and then teaching myself	83	87 _B	80	83	84	84
G. By finding self-study courses that let me set my own objectives and then moving at my own pace	69	68	70	68	70	67

Q71. These next few statements focus on the best ways for you, personally, to learn. Please tell us if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with them.

Base: All respondents

Table A15
Why Older Adults Want to Learn by Gender and Age

Strongly Agree/Somewhat Agree (net)

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50-59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
I want to learn...	%	%	%	%	%	%
A. So I can improve my job skills to make work easier or to get ahead	55	58	52	74 _{DE}	45 _E	33
B. So I can earn a degree or certification that will advance my career to help me earn more money	31	30	31	44 _{DE}	24	16
C. So I can enjoy my hobbies or recreational activities better	86	88	85	89	86	82
D. So I can manage my everyday life better	84	83	86	85	82	88
E. So I know the basic skills I need every day, such as reading, writing, basic math, or learning how to drive	63	66	61	63	62	67
F. For the simple joy of learning something new	91	90	92	92	92	88
G. So I can give back something to my community	65	63	67	68	63	62
H. So I can understand myself better	73	70	76 _A	78 _D	70	74
I. So I can understand and get along with others better	78	76	80	80	76	82
J. So I can help other people	82	81	82	85	79	79
K. So I can keep up with what's going on in the world	93	94	92	92	95	92
L. So I can talk about things with my children or grandchildren	80	75	84 _A	78	82	79
M. For my own spiritual or personal growth	91	89	93 _A	91	91	95

Q51. These next statements describe why you want to learn. Tell us whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each one.

Base: All respondents

Table A16
Time Investment by Gender and Age

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 - 59</u>	<u>60-74</u>	<u>75+</u>
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
I will spend all the time it takes to learn about something I really want to know	30	32	27	31	30	25
I will spend some time, if I can control when and how much	47	48	47	50	47	41
I will spend some time even if I cannot control when and how	7	6	9	7	8	6
I can't spend much time to learn about something I really want to know	7	6	8	4	8 _C	14 _{CD}
It depends	7	7	7	7	6	11 _D
Don't know	1	*	2 _A	1	1	2
Refused	1	1	*	*	1	1

Q200. Which of the following four statements best describes how much time you are willing to invest?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A17
When Older Adults Want to Use What They Learn by Gender and Age

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u> A	<u>Female</u> B	<u>50 - 59</u> C	<u>60-74</u> D	<u>75+</u> E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
I want to use what I learn immediately or very soon after I learn it	55	53	56	58 _E	56 _E	40
I am willing to wait to use what I learn some time in the near future	28	31	26	29	24	41 _{CD}
I am willing to wait to use what I learn for a long period of time	14	14	14	10	17 _C	17 _C
Don't know	3	3	3	3	3	1
Refused	1	1	1	*	1	1

Q60. Which of the following statements best describes WHEN you want to use what you learn.

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A18
Financial Investment by Gender and Age

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 - 59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
\$0	16	14	18	8	20 _C	26 _C
\$1-\$99	23	19	27 _A	26 _E	23	15
\$100-\$499	24	26	23	25	25	19
\$500-\$1999	10	13 _B	7	13 _E	9	5
\$2000+	4	5	3	6 _{DE}	3	1
Mean	\$520	\$643 _B	\$411	\$658	\$424	\$297
Median	\$101	\$105	\$100	\$103	\$101	\$105
Don't know	19	20	18	18	17	27 _D
Refused	4	3	4	2	4	6

Q205. How much would you be willing to pay, AT MOST, to learn about something you are extremely interested in or have always wanted to learn more about?

Base: All respondents

Table A19
Strong Interest in Learning Various Skills by Gender and Age

Extremely/Very Interested (Net)

	Total	Gender		Age		
		Male	Female	<u>50-59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
A. Having a healthy diet and nutrition	49	47	52	50	51	43
B. Exercise and fitness	39	37	41	42	39	32
C. Weight control	42	39	45	44 _E	45 _E	27
D. How to manage stress	46	43	48	51 _E	45	35
E. How to measure your own personal health status	48	46	49	48	49	42
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy	32	26	36 _A	32 _E	35 _E	18
G. How to get ahead in your job or career, or how to find a new one	21	20	22	34 _{DE}	13	8
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	52	48	56 _A	56 _E	52 _E	40

(Cont'd)

Table A19 (Cont'd)
Strong Interest in Learning Various Skills by Gender and Age

Extremely/Very Interested (Net)

	Total	Gender		Age		
		Male	Female	<u>50-59</u>	<u>60-74</u>	<u>75+</u>
		A	B	C	D	E
Base:	1019	464	555	410	465	142
	%	%	%	%	%	%
I. Basic life skill, such as reading, writing, or basic math or learning to drive	20	23 _B	18	24 _D	17	19
J. Your favorite hobby or pastime	62	64	60	65 _E	63 _E	50
K. How to give back or get involved in your local community	24	23	24	21	26	22
L. How to become a volunteer in your community	17	16	18	15	19	16
M. More about arts and culture, or other personal enrichment	30	25	34 _A	28	32	28
N. How to get more enjoyment or pleasure out of life	51	50	52	51	54	45
O. Educational travel opportunities	30	30	31	31	33 _E	21
P. More about spiritual or personal growth	42	35	48 _A	42	44	40
Q. More about understanding and getting along with others	38	37	39	37	38	40

Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...

Base: All respondents

Table A20
Prefer Individual Learning by Gender and Age
 (% saying tutor, teaching yourself, self-study, or Internet)

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 to 59</u>	<u>60 to 74</u>	<u>75+</u>
		A	B	C	D	E
	%	%	%	%	%	%
A. Having a healthy diet and nutrition (n=503)	64	66	63	64	64	65
B. Exercise and fitness (n=399)	56	59	53	57	54	61
C. Weight control (n=430)	56	60	54	58	56	54
D. How to manage stress (n=470)	54	53	55	56	51	62
E. How to measure your own personal health status (n=486)	60	61	58	57	61	63
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy (n=321)	58	53	61	58	59	53
G. How to get ahead in your job career, or how to find a new one (n=214)	50	49	51	51	48	53
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language or preparing taxes (n=532)	53	53	54	50	55	59
I. Basic life skill, such as reading, writing, or basic math or learning to drive (n=205)	52	57	45	52	52	50
J. Your favorite hobby or pastime (n=630)	57	64 _B	50	60	54	56
K. How to give back or get involved in your local community (n=241)	24	24	23	24	23	28
L. How to become a volunteer in your community (n=172)	21	23	20	22	16	39
M. More about arts and culture, or other personal enrichment (n=304)	38	45 _B	34	37	39	36
N. How to get more enjoyment or pleasure out of life (n=522)	45	47	43	48	43	42
O. Educational travel opportunities (n=309)	51	50	51	53	48	56
P. More about spiritual or personal growth (n=432)	41	41	42	48 _E	40	27
Q. More about understanding and getting along with others (n=388)	37	35	37	31	42	33

Q116. If you wanted to learn more about which of the following formats would you most prefer to use to learn about it.

Base: Extremely/Very interested in topic

NOTE: Number of cases for total sample are beside each item.

Table A21
Prefer Group Learning Format by Gender and Age

(% saying classroom, workshop, or group)

	<u>Total</u>	<u>Gender</u>		<u>Age</u>		
		<u>Male</u>	<u>Female</u>	<u>50 - 59</u>	<u>60 - 74</u>	<u>75 +</u>
		A	B	C	D	E
	%	%	%	%	%	%
A. Having a healthy diet and nutrition (n=503)	33	30	35	34	32	30
B. Exercise and fitness (n=399)	41	35	45	42	43	29
C. Weight control (n=430)	39	35	42	40	40	28
D. How to manage stress. (n=470)	41	43	40	43	42	30
E. How to measure your own personal health status (n=486)	38	36	40	42	36	32
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aromatherapy.(n=321)	39	41	37	42	38	32
G. How to get ahead in your job career, or how to find a new one (n=214)	45	41	48	44	46	47
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language or preparing taxes (n=532)	46	47	45	50	43	40
I. Basic life skill, such as reading, writing, or basic math or learning to drive (n=205)	41	33	49 _A	43	38	39
J. Your favorite hobby or pastime (n=630)	40	31	48 _A	38	42	35
K. How to give back or get involved in your local community (n=241)	69	68	69	68	69	70
L. How to become a volunteer in your community (n=172)	71	67	74	73	74	55
M. More about arts and culture, or other personal enrichment (n=304)	56	50	60	57	55	61
N. How to get more enjoyment or pleasure out of life (n=522)	50	46	54	47	52	54
O. Educational travel opportunities (n=309)	46	47	45	46	48	40
P. More about spiritual or personal growth (n=432)	53	49	55	50	54	56
Q. More about understanding and getting along with others (n=388)	60	60	59	67 _D	54	60

Q116. If you wanted to learn more about which of the following formats would you most prefer to use to learn about it.

Base: Extremely/Very interested in topic

NOTE: Number of cases for total sample are beside each item.

Table A22
Incidence and Impact of Major Life Events

	Incidence	Base	Impact			
	Yes, has happened		Major effect	Moderate effect	Very little effect	No effect at all
	%		%	%	%	%
G. Making a major change in your diet or level of physical activity	40	410	40	39	17	3
J. Having a major illness in your immediate family (not including yourself)	34	344	56	31	7	4
I. Becoming a grandparent	29	292	32	26	14	10
A. Having a death in your immediate family	26	270	56	32	5	6
K. You personally having a major illness	23	232	61	26	8	4
C. Becoming a caregiver for a parent or elderly family member	18	185	50	29	12	7
D. Becoming a caregiver for a child or grandchild	16	161	42	25	17	14
H. Retiring for the first time	14	143	42	25	19	12
I. Having a child go to college	12	126	20	36	18	22
B. Having your last child move out of your home	12	119	23	36	24	16
F. Having an adult child move back into your home	11	112	27	37	25	7
M. Going back to school to finish a degree or certification or to get an advanced degree or certification	6	59	14	27	17	2
L. Getting a degree, diploma, or certification (online only)	4	41	24	39	18	11

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91 How would you rate the effect this event had on you life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A23
Incidence and Impact of Major Life Events by Education and Income

A. Having a death in your immediate family

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	26	29 _C	25 _C	19	29 _F	28	20
Base: Major change	270	172	53	40	163	40	40
	%	%	%	%	%	%	%
A moderate effect/ A major effect (net)	88	90	81	91	89	86	93
No effect at all/Very little effect (net)	11	9	18	9	11	11	7

B. Having a child go to college

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	12	11	12	16 _A	10	12	21 _{DE}
Base: Major change	126	63	26	35	53	18	42
	%	%	%	%	%	%	%
A moderate effect/ A major effect (net)	56	44	66	70	50	56	62
No effect at all/Very little effect (net)	40	49	34	29	44	39	38

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A24
Incidence and Impact of Major Life Events by Education and Income

C. Becoming a caregiver for a parent or elderly family member

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	18	18	21 _C	15	20	17	14
Base: Major change	185	107	44	31	111	25	28
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	78	70	87 _A	94 _A	72	94	87
No effect at all/Very little effect (net)	18	26 _C	12	4	24	6	11

D. Becoming a caregiver for a child or grandchild

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	16	18 _C	15 _C	10	17	14	16
Base: Major change	161	106	33	21	94	20	31
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	67	61	76	77	64	81	59
No effect at all/Very little effect (net)	31	36	21	21	32	19	40

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A25
Incidence and Impact of Major Life Events by Education and Income

E. Having your last child move out of your home

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	12	12	11	12	13	11	12
Base: Major change	119	69	23	25	69	17	24
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	59	51	64	77	51	74	75
No effect at all/Very little effect (net)	40	48	36	21	48	24	24

F. Having an adult child move back into your home

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	11	10	12	13	11	10	14
Base: Major change	112	58	25	27	59	15	27
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	65	62	73	64	67	62	57
No effect at all/Very little effect (net)	32	34	25	35	30	36	41

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A26
Incidence and Impact of Major Life Events by Education and Income

G. Making a major change in your diet or level of physical activity

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	40	39	44	39	43	36	41
Base: Major change	410	230	93	83	236	52	81
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	79	75	83	87 _A	77	88 _D	78
No effect at all/Very little effect (net)	20	24 _C	15	12	21	11	21

H. Retiring for the first time

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	14	15	13	12	15	14	11
Base: Major change	143	88	27	25	83	20	22
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	68	62	77	78	69	65	65
No effect at all/Very little effect (net)	31	38 _C	20	21	30	35	34

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A27
Incidence and Impact of Major Life Events by Education and Income

I. Becoming a grandparent

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	29	33 ^C	28 ^C	17	34 ^{EF}	25	20
Base: Major change	292	193	60	37	190	36	40
	%	%	%	%	%	%	%
A moderate effect/ A major effect (net)	57	61	51	51	58	66	54
No effect at all/Very little effect (net)	24	26	21	21	25	20	20

J. Having a major illness in your immediate family (not including yourself)

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	34	34	35	31	36	36	27
Base: Major change	344	201	74	65	200	52	54
	%	%	%	%	%	%	%
A moderate effect/ A major effect (net)	87	87	86	89	89	86	80
No effect at all/Very little effect (net)	12	11	13	11	9	14	18

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A28
Incidence and Impact of Major Life Events by Education and Income

K. You personally having a major illness

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	23	24	21	20	25 _F	21	16
Base: Major change	232	142	45	42	137	31	32
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	86	87	83	87	86	93	81
No effect at all/Very little effect (net)	12	11	15	13	12	7	18

L. Getting a degree, diploma, or certification (online only)

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	511	292	107	107	288	76	103
	%	%	%	%	%	%	%
Has happened	8	5	12 _A	13 _A	6	10	11 _D
Base: Major change	41	14	13	14	18	8	12
	%	%	%	%	%	%	%
A moderate effect/A major effect (net)	63	50	66	75 _A	65	65	69
No effect at all/Very little effect (net)	29	34	29	25	22	35	31

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A29
Incidence and Impact of Major Life Events by Education and Income

M. Going back to school to finish a degree or certification or to get an advanced degree or certification

	Total	Education			Income		
		High school or less	Some college	College grad or higher	Less than \$50k	\$50k to \$75k	\$75k or more
		A	B	C	D	E	F
Base: All respondents	1019	586	213	213	552	145	197
	%	%	%	%	%	%	%
Has happened	6	3	10 _A	10 _A	5	5	9
Base: Major change	59	15	21	22	29	8	17
	%	%	%	%	%	%	%
A moderate effect/ A major effect (net)	41	31	46	45	47	41	35
No effect at all/Very little effect (net)	18	43	5	15	10	35	16
Don't know	14	-	24	16	15	-	25

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A30
Incidence and Impact of Major Life Events by Gender and Age

A. Having a death in your immediate family

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	26	21	31 _A	27	26	27
Base: Major change	270	98	172	110	121	38
	%	%	%	%	%	%
A moderate effect/A major effect (net)	88	77	95 _A	85	91	90
No effect at all/Very little effect (net)	11	22 _B	4	14	8	10

B. Having a child go to college

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	12	16 _B	9	18 _{DE}	10	5
Base: Major change	126	74	51	74	45	7
	%	%	%	%	%	%
A moderate effect/A major effect (net)	56	49	66	59	51	57
No effect at all/Very little effect (net)	40	48	29	40	43	22

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A31
Incidence and Impact of Major Life Events by Gender and Age

C. Becoming a caregiver for a parent or elderly family member

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
Base: All respondents	1019	A	B	C	D	E
	%	464	555	410	465	142
		%	%	%	%	%
Has happened	18	14	22 _A	18	18	18
Base: Major change	185	63	122	75	84	25
	%	%	%	%	%	%
A moderate effect/ A major effect (net)	78	73	81	84	74	76
No effect at all/Very little effect (net)	18	23	16	15	24	11

D. Becoming a caregiver for a child or grandchild

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
Base: All respondents	1019	A	B	C	D	E
	%	464	555	410	465	142
		%	%	%	%	%
Has happened	16	13	18	19 _D	14	13
Base: Major change	161	62	99	79	64	18
	%	%	%	%	%	%
A moderate effect/ A major effect (net)	67	60	71	64	67	78
No effect at all/Very little effect (net)	31	39	26	36	28	20

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A32
Incidence and Impact of Major Life Events by Gender and Age

E. Having your last child move out of your home

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	12	11	13	15 _{DE}	10	7
Base: Major change	119	49	70	63	46	10
	%	%	%	%	%	%
A moderate effect/A major effect (net)	59	46	68	65	56	32
No effect at all/Very little effect (net)	40	53	31	34	43	65

F. Having an adult child move back into your home

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	11	11	11	15 _{DE}	9	6
Base: Major change	112	53	59	62	41	9
	%	%	%	%	%	%
A moderate effect/A major effect (net)	65	59	70	62	68	70
No effect at all/Very little effect (net)	32	38	27	37	29	11

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A33
Incidence and Impact of Major Life Events by Gender and Age

G. Making a major change in your diet or level of physical activity

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	40	41	40	42	40	36
Base: Major change	410	188	222	174	186	50
	%	%	%	%	%	%
A moderate effect/ A major effect (net)	79	78	80	80	81	69
No effect at all/ Very little effect (net)	20	21	18	18	18	30

H. Retiring for the first time

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	14	16	12	9	19 _C	14
Base: Major change	143	74	69	35	89	19
	%	%	%	%	%	%
A moderate effect/ A major effect (net)	68	65	70	77	65	61
No effect at all/ Very little effect (net)	31	33	29	21	34	36

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A34
Incidence and Impact of Major Life Events by Gender and Age

I. Becoming a grandparent

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	29	27	30	27	29	35
Base: Major change	292	123	169	109	134	49
	%	%	%	%	%	%
A moderate effect/A major effect (net)	57	53	60	62	55	56
No effect at all/Very little effect (net)	24	26	23	24	27	19

J. Having a major illness in your immediate family (not including yourself)

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	34	26	40 _A	33	33	37
Base: Major change	344	119	225	136	154	53
	%	%	%	%	%	%
A moderate effect/A major effect (net)	87	80	91 _A	89	84	91
No effect at all/Very little effect (net)	12	18 _B	8	9	14	9

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A35
Incidence and Impact of Major Life Events by Gender and Age

K. You personally having a major illness

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	23	25	21	21	24	25
Base: Major change	232	116	116	86	111	35
	%	%	%	%	%	%
A moderate effect/ A major effect (net)	86	85	88	88	87	81
No effect at all/Very little effect (net)	12	14	11	10	12	18

L. Getting a degree, diploma, or certification (online only)

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents (Online only)	511	233	278	205	255	48
	%	%	%	%	%	%
Has happened	8	10	7	10 _D	6	8
Base: Major change	41	22	18	21	16	4
	%	%	%	%	%	%
A moderate effect/ A major effect (net)	63	65	62	66	60	60
No effect at all/very little effect (net)	29	31	28	30	28	32

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A36
Incidence and Impact of Major Life Events by Gender and Age

M. Going back to school to finish a degree or certification or to get an advanced degree or certification

	Total	Gender		Age		
		Male	Female	50 to 59	60 to 74	75 or older
		A	B	C	D	E
Base: All respondents	1019	464	555	410	465	142
	%	%	%	%	%	%
Has happened	6	6	5	9 _{DE}	4	3
Base: Major change	59	29	30	37	17	4
	%	%	%	%	%	%
A moderate effect/A major effect (net)	41	38	43	41	37	51
No effect at all/Very little effect (net)	18	18	19	14	24	35

Q81. Please tell us which of the following has happened to you, personally, during the past 12 months.

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all, very little effect, a moderate effect, or a major effect on your life?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half (0.5%). A dash (-) represents a value of zero.

Table A37
Ways Older Adults Learn
Telephone versus Online

Always/Most of the time (net)

	Total	Phone	Online	Gap
Base:	A 1019 %	B 508 %	C 511 %	
When I want or need to learn something I:				
A. Find someone to teach me who knows about the topic, such as a friend, co-worker, family member	41	44	39	-5
B. Take classes or attend community seminars or workshops	18	19	17	-2
C. Look for educational or informational television or radio programs	26	23	29	+6
D. Read newspaper articles, magazine articles, books, or journals	64	60	68 _B	+8
E. Search the Internet for information	35 _B	14	56 _{AB}	+42
F. Buy, rent, or borrow audio or video tapes	9	9	9	—
G. Buy or borrow computer-based teaching programs (tutorials)	12	7	16 _{AB}	+9
H. Start by doing what I want to learn about and learn from my mistakes and successes	44	46	41	-5
I. Find a public event, exposition, or exhibition featuring what I want to learn about	15	15	15	—
J. Enroll in a college or community college to take classes	10	9	11	+2
K. Find a tutor or professional to teach me	11	12	9	-3
L. Find an online or chat group interested in a topic	10	8	12	+4
M. Get involved in a community group or volunteer organization that focuses on what I want to learn about	12	14	10	-4

Q21. For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way.

Base: All respondents

Table A38
Best Ways to Learn
Telephone versus Online

	Agree	Agree		Neutral		Disagree	
		Telephone	Online	Telephone	Online	Telephone	Online
Base:	1019	508	511	508	511	508	511
	%	%	%	%	%	%	%
	A	B	C	D	E	F	G
A. In a group where I can share with other learners	68	74 _{AC}	61	8	25 _{AD}	18	13
B. When I have a guide, instructor, tutor, or mentor in a face-to-face situation	78	82 _C	73	6	19 _{AD}	11	7
C. By putting my hands on something and playing with it or figuring it out	90	88	91	5	5	6 _G	3
D. By watching or listening and then thinking about it	90	93 _C	88	1	9 _{AD}	6	3
E. In a formal teacher-classroom situation	53 _C	59 _C	48	10	31 _{AD}	31 _G	21
F. By gathering as much information as I can find and then teaching myself	83	84	83	5	11 _{AD}	11 _G	6
G. By finding self-study courses that let me set my own objectives and then moving at my own pace	69	68	70	11	18 _D	20 _G	11

Q71. These next few statements focus on the BEST WAYS for you, personally, to learn.

Base: All respondents

Note: Agree includes those responding “agree strongly” or “agree somewhat.” Disagree includes those respondents saying “disagree somewhat” or “disagree strongly.”

Table A39
Why Older Adults Want to Learn - Telephone versus Online

	Strongly Agree/Somewhat Agree						
	Agree	Agree		Neutral		Disagree	
	<u>Total</u>	<u>Telephone</u>	<u>Online</u>	<u>Telephone</u>	<u>Online</u>	<u>Telephone</u>	<u>Online</u>
Base:	1019	508	511	508	511	508	511
	%	%	%	%	%	%	%
	A	B	C	D	E	F	G
A. So I can improve my job skills to make work easier or to get ahead	55	55	56	17	27 ^{AD}	26 ^{AG}	15
B. So I can earn a degree or certification that will advance my career or help me earn more money	31 ^C	35 ^C	26	19	37 ^{AD}	42 ^G	33
C. So I can I enjoy my hobbies or recreational activities better	86	87	85	4	11 ^{AD}	8 ^G	3
D. So I can manage my everyday life better	84 ^C	88 ^C	81	6	15 ^{AD}	6	4
E. So I know the basic skills I need everyday, such as reading, writing, basic math, or learning how to drive	63 ^C	68 ^C	58	12	25 ^{AD}	18	15
F. For the simple joy of learning something new	91	90	93	3	6	6 ^G	2
G. So I can give back something to my community	65 ^C	78 ^{AC}	52	11	37 ^{AD}	11	10
H. So I can understand myself better	73 ^C	80 ^{AC}	67	8	24 ^{AD}	12	8
I. So I can understand and get along with others better	78 ^C	86 ^{AC}	70	5	24 ^{AD}	9	5
J. So I can help other people	82 ^C	88 ^{AC}	75	5	20 ^{AD}	7	5
K. So I can keep up with what's going on in the world	93	94	93	2	6 ^{AD}	4 ^G	1
L. So I can talk about things with my children or grandchildren	80 ^C	85 ^C	75	6	17 ^{AD}	9	7
M. For my own spiritual or personal growth	91	93	89	2	9 ^{AD}	4 ^G	1

Q51. Tell us whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each one.

Base: All respondents

Note: Agree includes those responding "agree strongly" or "agree somewhat." Disagree includes responses of "disagree strongly" or "disagree somewhat."

Table A40
Interest in Learning Various Skills - Telephone versus Online

Extremely/Very Interested (net)

	Total	Phone	Online	Gap
	A	B	C	
Base:	1019	508	511	
	%	%	%	
A. Having a healthy diet and nutrition	49	47	51	+4
B. Exercise and fitness	39	37	41	+4
C. Weight control	42	37	47 _{AB}	+10
D. How to manage stress	46	46	47	+1
E. How to measure your own personal health status	48	46	49	+3
F. Alternative medicine or remedies, such as acupuncture, medicinal herbs, or aroma therapy	32	25	38 _{AB}	+13
G. How to get ahead in your job or career, or how to find a new one	21	18	24	+6
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	52 _B	34	70 _{AB}	+36
I. Basic life skills, such as reading, writing, or basic math or learning to drive	20 _C	25 _C	16	-9
J. Your favorite hobby or pastime	62 _B	51	72 _{AB}	+21
K. How to give back or get involved in your local community	24	22	26	+4
L. How to become a volunteer in your community	17	16	18	+2
M. More about arts and culture, or other personal enrichment opportunities	30	25	35 _{AB}	+10
N. How to get more enjoyment or pleasure out of life	51	47	55 _B	+8
O. Educational travel opportunities	30	23	38 _{AB}	+15
P. More about spiritual or personal growth	42	43	42	-1
Q. More about understanding and getting along with others	38	39	37	-2

Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...

Base: All respondents

Table A41
Prefer Group Learning Format
Telephone versus Online

	(% responding classroom, workshop, or group)			
	Total	Phone	Online	Gap
	%	%	%	
A. Having a healthy diet and nutrition (p= 241 /o= 262)	33	35	30	-5
B. Exercise and fitness (p= 189/ o= 211)	41	42	40	-2
C. Weight control (p= 189/ o= 241)	39	46 _C	33	-13
D. How to manage stress (p= 232/ o= 238)	41	45	38	-7
E. How to measure your own personal health status (p= 234/ o= 252)	38	46 _C	31	-15
F. Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy (p= 129/ o= 192)	39	45	34	-11
G. How to get ahead in your job or career, or how to find a new one (p= 93/ o= 121)	45	51	41	-10
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes (p= 174/ o= 358)	46	54 _C	42	-12
I. Basic life skill, such as reading, writing, or basic math or learning to drive (p= 125/ o= 80)	41	44	35	-9
J. Your favorite hobby or pastime (p= 260/o= 370)	40	44	37	-7
K. How to give back or get involved in your local community (p= 111/ o= 131)	69	70	68	-2
L. How to become a volunteer in your community (p= 82/ o= 90)	71	78	65	-13
M. More about arts and culture, or other personal enrichment opportunities (p= 127/ o= 178)	56	59	54	-5
N. How to get more enjoyment or pleasure out of life (p= 241/ o= 281)	50	56 _C	45	-11
O. Educational travel opportunities (p= 117/ o= 192)	46	51	43	-8
P. More about spiritual or personal growth (p= 218/ o= 214)	53	59 _C	46	-13
Q. More about understanding and getting along with others (p=199/ o= 189)	60	61	58	-3

Q116. If you wanted to learn more about, which of the following formats would you MOST PREFER to use to learn about it?

Base: Extremely/very interested in topic

NOTE: Number of cases for phone (p) and online (o) are given beside each item.

Table A42
Prefer Individual Learning Format - Telephone versus Online

(% responding tutor, self-teaching, self-study, or Internet)

	Total	Phone	Online	Gap
A	B	C		
%	%	%		
A. Having a healthy diet and nutrition (p= 241 / o= 262)	64	59	68	+9
B. Exercise and fitness (p= 189/ o= 211)	56	52	59	+7
C. Weight control (p= 189/ o= 241)	56	47	64 _{AB}	+17
D. How to manage stress (p= 232/ o= 238)	54	47	61 _B	+14
E. How to measure your own personal health status (p= 234/ o= 252)	60	50	69 _{AB}	+19
F. Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy (p= 129/ o= 192)	58	48	65 _B	+17
G. How to get ahead in your job or career, or how to find a new one (p= 93/ o= 121)	50	41	57 _B	+16
H. How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes (p= 174/ o= 358)	53	45	58 _B	+13
I. Basic life skill, such as reading, writing, or basic math or learning to drive (p= 125/ o= 80)	52	46	60	+14
J. Your favorite hobby or pastime (p= 260/o= 370)	57	48	63 _{AB}	+15
K. How to give back or get involved in your local community (p= 111/ o= 131)	24	20	27	+7
L. How to become a volunteer in your community (p= 82/ o= 90)	21	16	26	+10
M. More about arts and culture, or other personal enrichment opportunities (p= 127/ o= 178)	38	29	45 _B	+16
N. How to get more enjoyment or pleasure out of life (p= 241/ o= 281)	45	36	52 _{AB}	+16
O. Educational travel opportunities (p= 117/ o= 192)	51	46	54	+8
P. More about spiritual or personal growth (p= 218/ o= 214)	41 _B	32	51 _{AB}	+19
Q. More about understanding and getting along with others (p=199/ o= 189)	37	32	42	+10

Q116. If you wanted to learn more about, which of the following formats would you MOST PREFER to use to learn about it?

Base: Extremely/very interested in topic

NOTE: Number of cases for phone (p) and online (o) are given beside each item.

Table A43
Time Investment
Telephone versus Online

	Total	Phone	Online	Gap
	A	B	C	
Base:	1019	508	511	
	%	%	%	
I will spend all the time it takes to learn about something I really want to know	30 _B	21	38 _{AB}	+17
I will spend some time, if I can control when and how much	47	50	45	-5
I will spend some time even if I cannot control when and how much	7	9	6	-3
I can't spend much time to learn about something I really want to know	7 _C	12 _{AC}	2	-10
It depends	7	7	7	—
Don't know	1	*	2	+2
Refused	1	*	1	+1

Q200. Which of the following four statements best describes how much time you are willing to invest?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half percent (0.5%). A dash (-) represents a value of zero.

Table A44
Financial Investment
Telephone versus Online

	Total	Phone	Online
	A	B	C
Base:	1019	508	511
	%	%	%
\$0	16	15	17
\$1-99	23 _B	13	33 _{AB}
\$100-499	24 _B	15	33 _{AB}
\$500-1999	10	7	13 _{AB}
\$2000+	4	5 _C	3
Mean	520 _C	878 _{AC}	347
Median	\$101	\$101	\$102
Don't know	19	38 _{AC}	-
Refused	4 _C	7 _{AC}	*

Q205. How much would you be willing to pay, AT MOST, to learn about something you are extremely interested in or have always wanted to learn more about?

Base: All respondents

NOTE: An asterisk (*) signifies a value of less than one-half percent (0.5%). A dash (-) represents a value of zero.

APPENDIX B
METHODOLOGY

METHODOLOGY

The AARP Survey on Lifelong Learning was conducted by telephone and online using the same survey instrument with a weighted, nationally representative sample of 1,019 adults age 50 or older. The sample included 511 respondents answering via the Internet and 508 interviewed by telephone. Bases and percentages reported are based on combined weighted data. The survey averaged about 15 minutes in length and was conducted August 27 - September 5, 1999.

Telephone Interviewing Procedures

The sample for the telephone survey was developed using a three-stage process. First, Harris identified previous survey research projects conducted by their firm that utilized a random digit dial methodology and included national samples of adults 18 and older as the target population. Second, they identified and selected those respondents from these studies who identified themselves as being aged 50 or older. Third, these people were pooled into a single database and formed the pre-screened list used for interviewing on this AARP project. During the interviewing process, respondents were re-screened to determine their eligibility; and if they qualified as age 50 and older, they were interviewed. This process made respondent selection as efficient as possible.

All telephone data collection was conducted from the telephone research centers of Harris Interactive, Inc., located in Binghamton, NY; Rochester, NY; and Youngstown, OH. Screening and interviewing for the study was conducted by Harris' professional interviewing staff. Harris supervisory field staff regularly monitored interviewing quality. The computerized telephone switching system independently recorded the outcome of every call. In addition, the computer-assisted telephone interviewing (CATI) system permitted online data entry and online data editing of the telephone interviews.

Telephone Sample Design

The telephone sample for this study was selected from age-appropriate respondents from previously conducted Harris telephone surveys. Each of the prior studies was based on a stratified random sampling process designed to produce representative samples of

persons in telephone households in the 48 contiguous United States (excluding Alaska and Hawaii). These earlier telephone samples used random digit selection procedures that assure equal representation of persons in both households which are "listed" in telephone directories as well as persons in households which are "unlisted." These samples are explicitly designed to ensure proper representation of households in different regions of the country and in central city, suburban, and rural areas.

Control of the Telephone Sample

Each telephone number selected in the sample is given every opportunity to be included in the study. Each number is called a minimum of three times on three separate days and times. Numbers that initially refuse are called again for refusal conversation. Callbacks are made at the respondent's convenience.

Telephone Response Rate

The response rate was calculated using the guidelines set forth by the American Association for Public Opinion Research. More specifically, response rate one was used and a response rate of 33% was achieved. The following formula was employed:

$$\text{Response Rate} = I / ((I + P) + (R + NC + O) + (UH + UO)) = 33\%$$

Table B1 is a summary of the final disposition codes and the number of pieces of sample in each category:

Disposition code	
Completed interview	508
Partial interview	90
Refusal and break off	79
Non-contact	420
Other	171
Unknown, if HH occupied	273
Unknown, other	0
Total sample used	1541
Response rate	33%

Online Interviewing Procedures

Online interviewing was employed as a second sample frame for this study for two reasons. First, AARP anticipates future online programmatic efforts and wanted to learn more about this emerging population. Second, with both telephone and online samples included, we can further explore the differences between traditional methodologies, such as telephone interviewing, and online surveys. Harris' proprietary online-interviewing capability utilizes three components:

1. The Harris Poll Online (HPOL) database of over 5.3 million cooperative respondents who have opted to receive invitations to take part in online surveys
2. Harris' proprietary technology for e-mailing to large groups of respondents and enabling large numbers of respondents to simultaneously complete the survey online
3. Advanced survey interviewing techniques adapted to the online environment, including password protection, skip patterns, and visually appealing fonts and formatting

Interviews are conducted using a self-administered online questionnaire via Harris' proprietary, web-assisted interviewing software. The Harris Online interviewing system permits online data entry by the respondents.

Online Sample Selection

Samples for the Harris Poll Online (HPOL) surveys are drawn from the HPOL database of approximately over 5.3 million households who are registered as participants in Harris' online database. E-mail addresses for respondents in the database are obtained from participation in the following sources: Harris Poll Online registration, the Harris/Excite Poll, Harris Poll Online banner advertisements, Excite product registrations, and Matchlogic sweepstakes.

A systematic approach was used to select the subset of database members who would be invited to participate in this survey. First, all members of the HPOL database aged 50 and older were identified. At the same time, data from the 1998 U.S. Census Current Population Survey (CPS)¹² were used to develop a demographic profile of the 50 and older population based on age, gender, education, income, race, and ethnicity. Second, members of the HPOL database were selected as potential participants in proportion to pre-determined targets for age and gender and were emailed invitations. During the data collection phase, gender, age, education, income, race, and ethnicity were tracked to their respective CPS targets for this population. Tracking revealed lower representation among certain groups that are presently underrepresented in the HPOL database including women, African-Americans, Hispanics, and those with lower incomes and lower educational status. Third, a second email invitation was sent to the identified sample targeting people meeting one or more of these particular demographic characteristics in an attempt to achieve as close to a representative sample of the over-50 population as possible.

¹² The Current Population Survey (CPS) is a nationally representative sample of the civilian, non-institutional population. The survey has been done on a monthly basis in about 50,000 households by the Census Bureau for more than 50 years and is the primary source of current demographic characteristics of the United States Population. The 1998 data were available when the survey was designed.

Control of the Online Sample

To maintain the reliability and integrity in the sample, Harris uses a password protection procedure. Each invitation contains a password unique to that email address. A respondent must enter the password at the beginning of the survey to gain access to the survey. Password protection ensures that a respondent completes the survey only one time and that any other non-invited respondent cannot use the URL.

Online Response Rate

The final sample disposition for the online portion of the survey is shown in Table M2. The response rate is 34%. We calculated the response rate by dividing the number of completes by the sum of the number of completes plus an estimate of the number of eligible non-responders plus suspended interviews.

$$\text{Response Rate} = \frac{\text{Completes}}{E \text{ (Non-responders)} + \text{Completes} + \text{Suspended Interviews}}$$

Where E= Estimated proportion of cases of unknown eligibility that are eligible. These values, with reference to Table B2 are as follows:

$$\text{Response rate} = \frac{I}{(I/H) * [(C-(G+H))] + (I +G)} = 34\%$$

Invitations	
A. First invitations mailed	15000
B. First invitations "bounced back"	3300
C. First invitations reaching destinations	11700
D. Second invitations mailed	10000
E. Second invitations "bounced back"	2000
F. Second invitations reaching destination	8000
G. Suspended interviews	1155
Interviews	
H. Total number of completed interviews	4235
I. Number of qualified respondents	2556
J. Number of screen-outs ¹³	1679

Data Processing

Telephone and online questionnaires are programmed with the following checks:

1. Question and response series
2. Skip patterns
3. Question rotation
4. Range checks
5. Mathematical checks
6. Consistency checks
7. Special edit procedures

For questions with pre-coded responses, the system only permits answers within a specified range; for example, if a question has three possible answer choices ("Agree," "Disagree," "Not Sure"), the system will only accept coded responses to these choices. All data are tabulated, checked for internal consistency, and processed by computer. A series of computer-generated tables is then produced for each of the key sample groups showing the results of each survey question, both by the total number of respondents and by the key subgroups.

¹³ Adults younger than 50 years.

Data Complications

Question 81 response option L, *Getting a degree, diploma or certification*, was inadvertently omitted from the telephone survey items. Harris attempted to contact respondents to complete the missing item, but the response rate was too low to justify including this response category in the telephone sample. Only responses from the online sample are reported and so noted.

Weighting

Almost all surveys of these types require some degree of weighting to ensure that the sample represents the actual proportions in the population. This study was no different. The data were weighted through a three-step process. The first step involved independently weighting the telephone and online samples to be representative of all adults 50 or older using the following demographic targets set forth in the 1999 Current Population Survey: age, sex, race, ethnicity, education, and income.¹⁴ These variables are often used in the weighting of surveys. Telephone interviews were also weighted by region. Harris Interactive, Inc., has observed that telephone interview data, uncorrected by region, tends to be slightly skewed. Unfortunately, regional information for the online interviews was not collected.

The second step attempted to equalize the sample sizes achieved by telephone and online. The online sample, being five times as large as the telephone sample, was weighted down to one-fifth to achieve parity with the telephone sample and to carry roughly equal weight once the data were combined.

The third step combined the telephone and online samples into one database. Table B3 displays weighted and unweighted percentages within demographic categories.

¹⁴ The Current Population Survey (CPS) is a nationally representative sample of the civilian, non-institutional population. The survey has been done on a monthly basis in about 50,000 households by the Census Bureau for more than 50 years and is the primary source of current demographic characteristics of the United States Population. At the time of data analysis the 1999 CPS data was available.

Data were weighted using a rim weighting algorithm based on Deming and Stephan's (1940)¹⁵ classic work. Rim weighting allows for multiple weighting variables to be applied at the same time, with the computer balancing each respondent's characteristics until a weight is calculated for each respondent. The computer algorithm processes the data in several iterative steps before arriving at the best compromise for each respondent that comes closest to overall target percentages. Rim weighting is used when, as in this case, a number of characteristics are to be weighted but the relation of the intersection of those characteristics is unknown. Table B4 compares the final weighted demographic variables for the telephone (508) and online (511) samples to the CPS population target parameters. Based on the results of these weightings, Harris judged that the marginal differences between the telephone and online samples were no greater than the differences between each sample and the population target on the demographic variables. The two samples were then combined for analysis.

Editing and Cleaning the Data

The data processing staff performs machine edits and additional cleaning for the entire data set. Harris edit programs act as a verification of the skip instructions and other data checks that are written into the program. The edit programs list any errors by case and type. These are then resolved by senior EDP personnel who inspect the original file and make appropriate corrections. Complete records are kept of all such procedures.

Reliability of Survey Percentages

The results from any sample survey are subject to sampling variation. The magnitude of this variation is measurable and is affected both by the number of interviews involved and by the level of percentages expressed in the results.

Table B5 shows the range of sampling variation that applies to percentage results for this survey. The chances are 95 in 100 that the survey results do not vary, plus or minus, by more than the indicated number of percentage points from the results that would have

¹⁵ Deming, W.E. & Stephens, F.F. (1940). On a least squares adjustment of a sampled frequency table when the expected marginal totals are known. *Annals of Mathematical Statistics*. Vol. 11.

been obtained had interviews been conducted with all persons in the universe represented by the sample. For example, if the response for a sample size of 1,000 is 30%, then in 95 out of 100 samples, the response of the total population would be between 27% and 33%. Note that survey results based on subgroups of a small size can be subject to large sampling error.

Sampling tolerances are also involved in the comparison of results from different parts of a sample (subgroup analysis) or from different surveys. Table B6 shows the percentage difference that must be obtained before a difference can be considered statistically significant. These figures, too, represent the 95% confidence interval.

Table B3
Weighted/Unweighted Demographic Percentages

	Number in sample weighted	Unweighted	Weighted
	(1019)	%	%
Age:			
50-59	410	48	40
60-74	465	46	46
75 or Older	142	6	14
Gender:			
Male	464	56	46
Female	555	44	54
Education:			
High school or less	586	34	57
Some college	213	33	21
College graduate or higher	213	32	21
Income:			
\$50,000 or less	552	42	54
\$50,000-\$75,000	145	24	14
\$75,000 or more	197	24	19
Race:			
White (not Hispanic)	822	87	81
Non-white	174	11	17

Table B4. Demographic Variables (Unweighted/Weighted Percentages) by Sample (Telephone, Online) and Population Target Percentages

Highest level of education	Telephone	Online	Population
	Unweighted/ Weighted	Unweighted/ Weighted	
High school graduate or less	31/57	35/57	61.39
Some college	36/18	33/18	19.28
College graduate (4-year degree)	13/13	20/13	11.52
Graduate or advanced degree	19/8	12/8	7.82

Age	Telephone - Years (Mean)	Online - Years (Mean)	Population --Years (Mean)
	Unweighted/ Weighted	Unweighted /Weighted	
	65.2/64.0	60.0/62.6	63

Income	Telephone	Online	Population
	Unweighted/ Weighted	Unweighted /Weighted	
\$15,000 or less	15/15	6/17	18.15
Between \$15,001 and \$25,000	18/13	10/14	15.7
Between \$25,001 and \$35,000	20/11	11/12	13.03
Between \$35,001 and \$50,000	16/12	16/14	14.79
Between \$50,001 and \$75,000	17/14	28/15	16.26
Between \$75,001 and \$100,000	8/8	15/9	9.4
\$100,001 or greater	5/11	11/12	12.66

Race/Ethnicity	Telephone	Online	Population
	Unweighted/ Weighted	Unweighted /Weighted	
White (non-Hispanic)	89/85	86/86	84.23
Non-white	10/9	11/8	9.19

Gender	Telephone	Online	Population
	Unweighted/ Weighted	Unweighted /Weighted	
Male	45/46	50/46	45.51
Female	55/54	42/54	54.49

Overall base unweighted: Total = 3,064, Telephone = 508, Online = 2,556

Overall base weighted: Total = 1,019, Telephone = 508, Online = 511

Population targets: 1999 Current Population Survey

Table B5
Approximate Sampling Tolerances (at 95% Confidence) To
Use in Evaluating Percentage Results Appearing in This Report

Number of people asked question on which survey result is based	Survey percentage result at 10% or 90%	Survey percentage result at 20% or 80%	Survey percentage result at 30% or 70%	Survey percentage result at 40% or 60%	Survey percentage result at 50%
1,500	2	2	2	3	3
1,000	2	2	3	3	3
900	2	3	3	3	3
800	2	3	3	3	3
700	2	3	3	4	4
600	2	3	4	4	4
500	3	4	4	4	4
400	3	4	4	5	5
300	3	5	5	6	6
200	4	6	6	7	7
100	6	8	9	10	10
50	8	11	13	14	14

Table B6
Approximate Sampling Tolerances (at 95% Confidence) To Use in Evaluating
Differences Between Two Percentage Results Appearing in Survey

Approximate sample size of two groups asked question on which survey result is based	Survey percentage result at 10% or 90%	Survey percentage result at 20% or 80%	Survey percentage result at 30% or 70%	Survey percentage result at 40% or 60%	Survey percentage result at 50%
1,500 versus 1,500	2	3	3	4	4
1,000	2	3	4	4	4
500	3	4	5	5	5
200	4	6	7	7	7
100	6	8	9	10	10
50	8	11	13	14	14
1,000 versus 1,000	3	4	4	4	4
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
50	9	11	13	14	14
500 versus 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	6	9	10	11	11
50	9	12	13	14	15
300 versus 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
50	9	12	14	15	15
200 versus 200	6	8	9	10	10
100	7	10	11	12	12
50	9	12	14	15	15
100 versus 100	8	11	13	14	14
50	10	14	16	17	17
50 versus 50	12	16	18	19	20

Non-Sampling Error

Sampling error is only one way in which survey findings may vary from the findings that would result from interviewing every member of the relevant population. Survey research is susceptible to human and mechanical errors as well, such as respondent recording errors, and to errors resulting from the experimental nature of current Internet research. The procedures used by Harris Interactive, Inc., however, including the sampling and interviewing systems described earlier, seek to keep these types of errors to a minimum.

APPENDIX C
ANNOTATED QUESTIONNAIRES

1. Annotated Questionnaire for Telephone and Online Samples Combined

HARRIS INTERACTIVE INC.
111 FIFTH AVENUE
NEW YORK, NEW YORK 10003

Study No. 11287

September 7, 1999

Field Period: August 27 - September 5, 1999
URL:

Interviewer:

Date:

FOR OFFICE USE ONLY:

Questionnaire No.: _____
(1-6)

Card Number: _____
(7-8)

SAMPLE SET NO. (660,662)

Area Code:

Telephone No.:

NOTE: Unless otherwise indicated figures shown are percentages.

Online Introduction

The survey should only take about 15 to 20 minutes. The information you provide will be kept strictly confidential, and your individual answers will never be shared with anyone.

These first few questions focus on how adults learn. For example adults can enroll in a school and earn a degree, diploma, or certificate; get on-the-job training; participate in groups; go to workshops or seminars, learn one-on-one from another person, or learn by teaching themselves.

For each of the following ways adults learn, tell us whether you always learn this way, learn this way most of the time, learn this way some of the time, or, you never learn this way.

E-mail Invitation

Subject: Harris Poll Online LifeLong Learning Survey.

What motivates you to learn? Is it to get ahead in life, just for the simple joy of learning, or some other reason? Do you like to learn new things in a classroom, on your own, or some other way? The Harris Poll Online is conducting this national survey for AARP (American Association of Retired Persons) about how adults 50 YEARS AND OLDER learn. Your responses and opinions will help provide important and valuable information for developing new opportunities for life-long learning.

If you are interested in finding out what other survey respondents thought, we will be posting some of the results of the survey to our website shortly following completion of this project.

To begin the survey, please proceed to:

<http://www.harrispollonline.com/surveys/aarp1>

Please enter the password below when prompted at the beginning of the survey. This password ensures that you and only you can enter the survey.

Password

You have received this invitation from the Harris Poll Online because your e-mail address was selected at random from the Harris Poll Online's registry of members. You (or someone using your e-mail address) may have become a member of the Harris Poll Online in one of several ways:

- (a) Registering directly with us;
- (b) Entering a sweepstakes sponsored by Matchlogic (which includes DeliverE and Preferences.com) and, in doing so, opting in to participate in the Harris Poll Online; or
- (c) Signing up for free products and services from Excite or Netscape and, in doing so, opting in to participate in the Harris Poll Online.

If you wish to be excluded from the Harris Poll Online mailings, please reply to this message with "unsubscribe" written in the subject heading. If you have any other concerns or questions, please e-mail our webmaster at webmaster@hpol.gsbc.com.

Reminder E-mail

Subject: Harris Poll Online LifeLong Learning Survey.

Hello! There is still time to tell us about your experiences with lifelong learning. If you have not yet been able to participate in our survey, we invite you to share your views with us. If you have already completed our survey, thank you very much for your participation and cooperation.

What motivates you to learn? Is it to get ahead in life, just for the simple joy of learning, or some other reason? Do you like to learn new things in a classroom, on your own, or some other way? The Harris Poll Online is conducting this national survey for AARP about how adults 50 YEARS AND OLDER learn. Your responses and opinions will help provide important and valuable information for developing new opportunities for life-long learning.

If you are interested in finding out what other survey respondents thought, we will be posting some of the results of the survey to our website shortly following completion of this project.

To begin the survey, please proceed to:

<http://www.harrispollonline.com/surveys/aarp1>

Please enter the password below when prompted at the beginning of the survey. This password ensures that you and only you can enter the survey.

Password

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- (d) Registering directly with us;
- (e) Entering a sweepstakes sponsored by Matchlogic (which includes DeliverE and Preferences.com) and, in doing so, opting in to participate in the Harris Poll Online; or
- (f) Signing up for free products and services from Excite or Netscape and, in doing so, opting in to participate in the Harris Poll Online.

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Telephone Introduction

Hello, I'm _____ from Harris Interactive in New York, the people who conduct the Harris Poll. We are conducting a survey for AARP and would like to speak to the oldest (male/female) adult in the household who is at home now. Would that be you or someone else?

Respondent
Someone else
Don't know
Refused

Continue
Go to Callback screen
Go to Callback screen
Go to Callback screen

TELEPHONE SCREENING QUESTIONS:

BASE: ALL RESPONDENTS

Q10. Overall, how satisfied are you with your life these days – very satisfied, somewhat satisfied, not very satisfied or not at all satisfied? (TELEPHONE ONLY)

	<u>TOTAL</u>
Very satisfied	59
Somewhat satisfied	35
Not very satisfied	3
Not at all satisfied	2
Don't know	*
Refused	1

BASE: ALL RESPONDENTS

Q11. Which of the following age groups best represents your age – 18-29, 30-49, 50-65 or 65 and older?
(TELEPHONE ONLY)

	<u>TOTAL</u>	
18-29	-	Screen out
30-49	-	Screen out
50-64	52	Ask Q15
65+	48	Ask Q15
Don't know	-	Screen out
Refused	-	Screen out

BASE: ALL RESPONDENTS

Q21. (*Telephone:* For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way.) When I want or need to learn something I (*telephone:* READ EACH ITEM)...

[RANDOMLY ROTATE ITEMS]	Always	Most of the time	Some of the time	Never	Don't Know	Re-fused
A) find someone to teach me who knows about the topic, such as a friend, co-worker, family member	9	33	48	10	1	*
B) take classes or attend community seminars or workshops about what I want to learn	5	13	39	41	1	*
C) look for educational or informational television or radio programs about what I want to learn	9	17	46	26	1	*
D) read newspapers articles, magazine articles, books, or journals on the topic I want to learn about	23	41	32	4	*	*
E) search the Internet for information about what I want to learn	13	23	30	34	*	*
F) buy, rent, or borrow audio or video tapes about what I want to learn	2	7	40	50	1	*
G) buy or borrow computer-based teaching programs (tutorials) about what I want to learn	4	8	30	57	1	1
H) start by doing what I want to learn about and learn from my mistakes and successes	13	31	48	8	1	*
I) find a public event, exposition, or exhibition featuring what I want to learn about	3	12	52	31	1	*
J) enroll in a college or community college to take classes about what I want to learn	3	7	31	57	1	*
K) find a tutor or professional to teach me what I want to learn about	3	8	30	57	1	*
L) find an online or chat group interested in a topic I want to learn about	2	8	23	65	2	*
M) get involved in a community group or volunteer organization that focuses on what I want to learn about	4	8	35	51	2	*

BASE: ALL RESPONDENTS

Q45. What other ways do you typically use to learn about things you want to know? [*telephone probe:* Can you think of any other special way you learn about things? *Telephone:* RECORD RESPONSE VERBATIM]

[TEXT ONLY]

BASE: ALL RESPONDENTS

Q51. These next statements describe why you want to learn. Tell us whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each one.

[TELEPHONE: READ EACH ITEM]. Do you strongly agree, somewhat agree, neither disagree, somewhat disagree, or strongly disagree?

<i>[RANDOMLY ROTATE ITEMS]</i>	Strongly Agree	Some what Agree	Neither Agree nor Disagree	Some-what Disagree	Strongly Disagree	Don't know	Re-fused
I want to learn...							
A) so I can improve my job skills to make work easier or to get ahead	32	23	22	9	12	1	1
B) so I can earn a degree or certification that will advance my career or help me earn more money	14	16	28	17	20	2	2
C) so I can I enjoy my hobbies or recreational activities better	53	34	7	2	3	*	*
D) so I can manage my everyday life better	50	35	10	2	3	*	*
E) so I know the basic skills I need every day, such as reading, writing, basic math, or learning how to drive	39	24	18	7	10	2	*
F) for the simple joy of learning something new	60	31	4	2	2	*	*
G) so I can give back something to my community	31	34	24	6	4	1	*
H) so I can understand myself better	40	34	16	5	5	1	*
I) so I can understand and get along with others better	42	36	15	4	3	*	*
J) so I can help other people	42	40	12	4	2	*	*
K) so I can keep up with what's going on in the world	63	30	4	1	1	*	*
L) so I can talk about things with my children or grandchildren	48	32	11	4	4	1	1
M) for my own spiritual or personal growth	62	30	6	1	1	*	*

BASE: ALL RESPONDENTS

Q60. Which of the following three statements best describes when you want to use what you learn
[ALLOW ONLY ONE ACCEPT]

	TOTAL
I want to use what I learn immediately or very soon after I learn it	55
I am willing to wait to use what I learn some time in the near future	28
I am willing to wait to use what I learn for a long period of time	14
Don't know	3
Refused	1

BASE: ALL RESPONDENTS

Q71. These next few statements focus on the best ways for you, personally, to learn. Please tell us if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with them.

<i>[RANDOMLY ROTATE ITEMS]</i>							
I learn best...	Strongly Agree	Some-what Agree	Neither Agree nor Disagree	Some-what Disagree	Strongly Disagree	Don't know	Re-fused
A) in a group where I can share with other learners	30	37	17	10	6	*	*
B) when I have a guide, instructor, tutor, or mentor in a face-to-face situation	40	38	13	6	3	1	*
C) by putting my hands on something and playing with it or figuring it out	60	29	5	3	1	*	*
D) by watching or listening and then thinking about it	45	45	5	3	2	-	*
E) in a formal teacher-classroom situation	15	38	20	16	10	1	*
F) by gathering as much information as I can find and then teaching myself	47	37	8	6	3	*	*
G) by finding self-study courses that let me set my own objectives and then moving at my own pace.	33	36	15	10	5	1	*

This next section is a bit different. We'd like to know how interested you might be in learning about the following topics.

BASE: ALL RESPONDENTS

Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...[TELEPHONE: READ EACH ITEM]

<i>[RANDOMLY ROTATE ITEMS]</i>	Ex- tremely	Very	Some- what	Not Very	Not at all	Don't know	Re- fused
A) having a healthy diet and nutrition	22	28	34	9	7	*	*
B) exercise and fitness	15	24	37	14	10	*	*
C) weight control	19	23	31	13	13	*	*
D) how to manage stress	22	25	29	15	9	*	*
E) how to measure your own personal health status	19	28	34	11	6	1	*
F) alternative medicine or remedies, such as acupuncture, medicinal herbs, or aroma therapy	14	17	30	19	19	1	*
G) how to get ahead in your job or career, or how to find a new one	10	11	21	21	35	1	2
H) how to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	24	28	24	9	14	*	*
I) basic life skills, such as reading, writing, or basic math or learning to drive	9	11	22	24	32	1	1
J) your favorite hobby or pastime	28	33	26	7	5	1	*
K) how to give back or get involved in your local community	8	16	41	21	13	*	1
L) how to become a volunteer in your community	6	11	38	26	18	1	1
M) more about arts and culture, or other personal enrichment opportunities	13	17	35	22	12	1	1
N) how to get more enjoyment or pleasure out of life	22	29	32	11	6	*	*
O) educational travel opportunities	13	17	29	21	18	1	1
P) more about spiritual or personal growth	20	23	32	15	10	*	*
Q) more about understanding and getting along with others	15	24	41	13	7	*	1

**ASK Q116 ABOUT EACH ITEM IN Q106 IF "EXTREMELY OR VERY INTERESTED"
(Q106=01,02)**

BASE: EXTREMELY OR VERY INTERESTED

Q116. You mentioned you would be interested in learning more about [TELEPHONE: READ EACH ITEM RATED "EXTREMELY INTERESTED" OR "VERY INTERESTED" FROM Q8] [ONLINE: SOME OF THESE TOPICS]. If you wanted to learn more about [TELEPHONE: REACH ITEM ONLINE: THESE TOPICS], which of the following formats would you most prefer to use to learn about it? Would you prefer the traditional classroom format, a less formal community workshop or seminar; a tutor or pro teaching you one-on-one; joining a group interested in the topic; buying, renting, or borrowing educational material and teaching yourself; self-study course; using the Internet, or something else?

[RANDOMLY ROTATE ITEMS]	Class- room	Work- shop	Group	Tutor or Pro	Teach- ing yourself	Self study course	Inter- net	Else
A) Having a healthy diet and nutrition	7	12	14	9	28	13	14	3
B) Exercise and fitness	7	11	22	14	24	10	8	3
C) Weight control	6	12	21	12	24	11	10	5
D) How to manage stress	7	16	19	10	20	13	11	4
E) How to measure your own personal health status	7	16	16	16	19	11	14	2
F) Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy	10	14	15	14	13	14	17	3
G) How to get ahead in your job or career, or how to find a new one	10	23	12	13	12	10	15	5
H) How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	23	17	6	21	14	9	10	1
I) Basic life skills, such as reading, writing, or basic math or learning to drive	23	8	10	16	22	10	4	8
J) Your favorite hobby or pastime	5	20	14	10	27	9	11	4
K) How to give back or get involved in your local community	4	30	35	3	8	7	5	7
L) How to become a volunteer in your community	4	27	40	3	11	2	4	8
M) more about arts and culture, or other personal enrichment opportunities	12	24	20	4	14	7	12	6
N) how to get more enjoyment or pleasure out of life	4	18	28	6	19	12	8	5
O) educational travel opportunities	8	19	19	7	11	8	25	3
P) more about spiritual or personal growth	7	13	32	7	17	12	5	6
Q) more about understanding and getting along with others	7	19	34	6	17	9	5	4

BASE: ALL RESPONDENTS

Q200. These next questions are about how much you are willing to personally invest in learning about something you always wanted to learn about. By investing we mean how much time you are willing to take or how much you might be willing to pay to learn about this one thing you really want to know.

Which of the following four statements best describes how much time you are willing to invest?

	TOTAL
I will spend all the time it takes to learn about something I really want to know about.	30
I will spend some time, if I can control when and how much.	47
I will spend some time, even if I cannot control when and how much.	7
I can't spend much time to learn about something I really want to know	7
It depends	7
Don't know	1
Refused	1

BASE: ALL RESPONDENTS

Q205. How much would you be willing to pay, at most, to learn about something you are extremely interested in or have always wanted to learn more about. [ENTER DOLLAR AMOUNT, DO NOT ACCEPT RANGE]

WOULD NOT BE WILLING TO PAY	TOTAL
I would be willing to pay at most	\$519.80 (Mean) \$101.00 (Median)
Not sure[DO NOT READ]	19
Refused[DO NOT READ]	4

BASE: ALL RESPONDENTS

Q81. People experience major changes at different periods during their lifetimes. Please tell us which of the following has happened to you, personally, during the past 12 months.

<i>[RANDOMLY ROTATE ITEMS]</i>	Has Happened	Has Not Happened	Don't know	Refused
A) Having a death in your immediate family	26	73	*	1
B) Having a child go to college	12	87	*	1
C) Becoming a caregiver for a parent or elderly family member	18	80	1	1
D) Becoming a caregiver for a child or grandchild	16	83	1	1
E) Having your last child move out of your home	12	87	*	1
F) Having an adult child move back into your home	11	88	*	1
G) Making a major change in your diet or level of physical activity	40	59	*	*
H) Retiring for the first time	14	85	1	1
I) Becoming a grandparent	29	71	*	1
J) Having a major illness in your immediate family (not including yourself)	34	65	*	1
K) You personally having a major illness	23	75	1	1
L) <i>Online only:</i> Getting a degree, diploma, or certification	4	45	*	1
M) Going back to school to finish a degree or certification or to get an advanced degree or certification	6	93	*	1

ASK Q91 FOR ANY "HAS HAPPENED" IN Q81- OTHERS SKIP TO Q300

BASE: MAJOR CHANGE HAS HAPPENED (Q 81 any items 1-13=01)

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all; very little effect, a moderate effect, or a major effect on your life?

<i>[RANDOMLY ROTATE ITEMS]</i>	No effect at all	Very little effect	A moderate effect	A major effect	Don't know	Re-fused
A) Having a death in your immediate family	6	5	32	56	1	*
B) Having a child go to college	22	18	36	20	2	1
C) Becoming a caregiver for a parent or elderly family member	7	12	29	50	3	*
D) Becoming a caregiver for a child or grandchild	14	17	25	42	1	1
E) Having your last child move out of your home	16	24	36	23	*	1
F) Having an adult child move back into your home	7	25	37	27	2	1
G) Making a major change in your diet or level of physical activity	3	17	39	40	1	*
H) Retiring for the first time	12	19	25	42	1	*
I) Becoming a grandparent	10	14	26	32	*	*
J) Having a major illness in your immediate family (not including yourself)	4	7	31	56	1	1
K) You, personally, having a major illness	4	8	26	61	*	1
L) <i>Online only:</i> Getting a degree, diploma, or professional certification	11	18	39	24	5	3
M) Going back to school to finish a degree or certification program or to get an advanced degree or certification.	2	17	27	14	14	1

BASE: ALL RESPONDENTS

Only a few questions to go. This information is completely anonymous and is never reported on an individual level. We use this information to find out if people taking this survey are similar or different from the population as a whole.

Q300.	What is your marital status?	TOTAL
	Never married	5
	Married	62
	Separated or divorced	14
	Widowed	18
	Other	*
Q305.	Are there any children or grandchildren under the age of 18 living at your home?	
	Yes	11
	No	89
Q310.	Does a parent, in-law, or other adult relative live with you at your home?	
	Yes	15
	No	84
Q320.	Are one or both of your parents still living?	
	Yes	29
	No	71
Q325.	Are you or your spouse currently a member of AARP or NRTA?	
	Yes	61
	No	38
	Don't Know	1
Q330.	What is your current employment status?	
	Employed full time	27
	Employed part time (not retired)	5
	Retired, working part time	8
	Retired, not working at all	45
	Unemployed (looking for work)	2
	Self-employed	6
	Other	7
Q335.	What is the highest level of education you have completed?	TOTAL
	Some high school or less	10
	High school graduate	48
	Technical or vocational school	3
	Some college	14
	College graduate (2-year degree)	4
	College graduate (4-year degree)	13
	Graduate or advanced degree	8

Q340.	What is your age?	Years (Mean)
		63.4
Q350.	What was your approximate family income before taxes in 19? This is income from for all household members from all sources including earnings, wages, Social Security, pensions, interest and dividends on investment	
	\$15,000 or less	16
	Between \$15,001 and \$25,000	14
	Between \$25,001 and \$35,000	11
	Between \$35,001 and \$50,000	13
	Between \$50,001 and \$75,000	14
	Between \$75,001 and \$100,000	8
	Between \$100,001 and \$120,000	4
	Between \$120,001 and \$150,000	4
	\$150,001 or more	3
	Don't Know	4
	Refused	9
Q355.	Which of the following best describes you?	
	White or Caucasian	85
	Black or African American	9
	American Indian, Aleut, or Eskimo	1
	Asian or Pacific Islander	1
	Other	2
Q360.	Are you of Hispanic or Spanish ethnicity or descent?	
	Yes	6
	No	92
	Don't Know	*
	Refused	1
Q365.	Are you male or female?	
	Male	46
	Female	54

2. Annotated Questionnaire for Telephone and Online Samples Compared

HARRIS INTERACTIVE INC.
111 FIFTH AVENUE
NEW YORK, NEW YORK 10003
No.: _____

FOR OFFICE USE ONLY:

Questionnaire

(1-6)

Study No. 11287

Card Number:

(7-8)

September 7, 1999
(660,662) 1-083

SAMPLE SET NO.

Field Period: August 27 - September 5, 1999
URL:

Interviewer:

Date:

Area Code:

Telephone No.:

NOTE: Unless otherwise indicated figures shown are percentages.

Online Introduction

The survey should only take about 15 to 20 minutes. The information you provide will be kept strictly confidential, and your individual answers will never be shared with anyone.

These first few questions focus on how adults learn. For example adults can enroll in a school and earn a degree, diploma, or certificate; get on-the-job training; participate in groups; go to workshops or seminars, learn one-on-one from another person, or learn by teaching themselves.

For each of the following ways adults learn, tell us whether you always learn this way, learn this way most of the time, learn this way some of the time, or, you never learn this way.

E-mail Invitation

Subject: Harris Poll Online LifeLong Learning Survey.

What motivates you to learn? Is it to get ahead in life, just for the simple joy of learning, or some other reason? Do you like to learn new things in a classroom, on your own, or some other way? The Harris Poll Online is conducting this national survey for AARP (American Association of Retired Persons) about how adults 50 YEARS AND OLDER learn. Your responses and opinions will help provide important and valuable information for developing new opportunities for life-long learning.

If you are interested in finding out what other survey respondents thought, we

will be posting some of the results of the survey to our website shortly following completion of this project.

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<http://www.harrispollonline.com/surveys/aarp1>

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What motivates you to learn? Is it to get ahead in life, just for the simple joy of learning, or some other reason? Do you like to learn new things in a classroom, on your own, or some other way? The Harris Poll Online is conducting this national survey for AARP about how adults 50 YEARS AND OLDER learn. Your responses and opinions will help provide important and valuable information for developing new opportunities for life-long learning.

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Telephone Introduction

Hello, I'm _____ from Harris Interactive in New York, the people who conduct the Harris Poll. We are conducting a survey for AARP and would like to speak to the oldest (male/female) adult in the household who is at home now. Would that be you or someone else?

Respondent	Continue
Someone else	Go to Callback screen
Don't know	Go to Callback screen
Refused	Go to Callback screen

TELEPHONE SCREENING QUESTIONS:

BASE: ALL RESPONDENTS

Q10. Overall, how satisfied are you with your life these days – very satisfied, somewhat satisfied, not very satisfied or not at all satisfied? (TELEPHONE ONLY)

	<u>TEL</u>	<u>ONL</u>
Very satisfied.....	59	-
Somewhat satisfied.....	35	-
Not very satisfied	3	-
Not at all satisfied.....	2	-
Don't know	*	-
Refused	1	-

BASE: ALL RESPONDENTS

Q11. Which of the following age groups best represents your age – 18-29, 30-49, 50-65 or 65 and older?

(TELEPHONE ONLY)

	<u>TEL</u>	<u>ONL</u>
18-29	-	-
30-49	-	-
50-64	52	-
65+	48	-
Don't know	-	-
Refused	-	-

NOTE: In the following questions this format is used to show results:

TELEPHONE / ONLINE

11

7

BASE: ALL RESPONDENTS

Q21 *(Telephone: For each of the following ways adults learn, tell me whether you always learn this way, learn this way most of the time, learn this way some of the time, or you never learn this way.)* When I want or need to learn something I *(telephone: READ EACH ITEM)*

<i>[RANDOMLY ROTATE ITEMS]</i>	Always	Most of the time	Some of the time	Never	Don't Know	Re-fused
A) find someone to teach me who knows about the topic, such as a friend, co-worker, family member	10/7	34/32	46/49	10/10	-/1	-/*
B) take classes or attend community seminars or workshops about what I want to learn	7/4	12/13	34/45	47/36	*/1	-/1
C) look for educational or informational television or radio programs about what I want to learn	8/10	15/19	44/49	33/20	-/2	*/*
D) read newspapers articles, magazine articles, books, or journals on the topic I want to learn about	20/27	40/42	35/30	5/2	-/*	-/*
E) search the Internet for information about what I want to learn	5/20	9/36	19/41	67/2	*/*	*/*
F) buy, rent, or borrow audio or video tapes about what I want to learn	3/2	6/8	32/47	59/42	*/1	-/1
G) buy or borrow computer-based teaching programs (tutorials) about what I want to learn	4/4	4/12	17/42	74/40	*/2	1/1
H) start by doing what I want to learn about and learn from my mistakes and successes	16/10	31/31	46/50	8/8	*/1	-/*
I) find a public event, exposition, or exhibition featuring what I want to learn about	4/2	11/13	50/55	34/28	-/1	*/1
J) enroll in a college or community college to take classes about what I want to learn	5/2	4/9	28/34	63/51	*/2	-/1
K) find a tutor or professional to teach me what I want to learn about	5/2	7/8	29/31	59/56	-/3	-/1
L) find an online or chat group interested in a topic I want to learn about	2/2	6/9	13/32	78/52	1/3	-/1
M) get involved in a community group or volunteer organization that focuses on what I want to learn about	5/2	8/8	38/33	49/53	-/3	-/1

BASE: ALL RESPONDENTS

Q45. What other ways do you typically use to learn about things you want to know? *[telephone probe: Can you think of any other special way you learn about things? Telephone: RECORD RESPONSE VERBATIM*

[TEXT ONLY]

BASE: ALL RESPONDENTS

Q51. These next statements describe why you want to learn. Tell us whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each one. [TELEPHONE: READ EACH ITEM]. Do you strongly agree, somewhat agree, neither disagree, somewhat disagree, or strongly disagree?

[RANDOMLY ROTATE ITEMS] I want to learn...	Strongly Agree	Some-what Agree	Neither Agree nor Disagree	Some-what Dis-agree	Strongly Disagree	Don't know	Re-fused
A) so I can improve my job skills to make work easier or to get ahead	36/28	19/27	17/27	12/6	14/9	1/1	1/1
B) so I can earn a degree or certification that will advance my career or help me earn more money	18/11	18/15	19/37	22/12	20/21	1/2	2/2
C) so I can I enjoy my hobbies or recreational activities better	57/48	31/37	4/11	4/1	5/2	-/*	-/*
D) so I can manage my everyday life better	59/41	29/40	6/15	2/2	4/2	-/*	-/*
E) so I know the basic skills I need every day, such as reading, writing, basic math, or learning how to drive	43/34	25/23	12/25	7/6	11/9	3/1	-/1
F) for the simple joy of learning something new	59/61	31/31	3/6	3/1	3/*	*/-	-/*
G) so I can give back something to my community	43/19	35/33	11/37	5/6	5/3	*/1	*/*
H) so I can understand myself better	48/31	32/35	8/24	5/5	6/4	*/1	*/*
I) so I can understand and get along with others better	53/32	34/38	5/24	6/3	3/2	-/*	-/*
J) so I can help other people	51/32	37/43	5/20	4/3	3/1	-/1	-/*
K) so I can keep up with what's going on in the world	66/61	27/32	2/6	2/1	2/*	*/*	*/*
L) so I can talk about things with my children or grandchildren	58/38	26/37	6/17	4/3	5/4	1/1	*/1
M) for my own spiritual or personal growth	66/58	27/32	2/9	2/1	3/*	-/*	-/*

BASE: ALL RESPONDENTS

Q60. Which of the following three statements best describes when you want to use what you learn [ALLOW ONLY ONE ACCEPT].

	TOTAL
I want to use what I learn immediately or very soon after I learn it	45/64
I am willing to wait to use what I learn some time in the near future	35/21
I am willing to wait to use what I learn for a long period of time	18/10
Don't know	2/3
Refused	*/1

BASE: ALL RESPONDENTS

Q71. These next few statements focus on the best ways for you, personally, to learn. Please tell us if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with them.

<i>[RANDOMLY ROTATE ITEMS]</i>	Strongly Agree	Some-what Agree	Neither Agree nor Disagree	Some-what Disagree	Strongly Disagree	Don't know	Re-fused
I learn best...							
A) in a group where I can share with other learners	39/21	35/40	8/25	10/9	8/3	*/1	**/*
B) when I have a guide, instructor, tutor, or mentor in a face-to-face situation	45/35	37/38	6/19	7/5	4/2	*/1	**/*
C) by putting my hands on something and playing with it or figuring it out	60/61	28/30	5/5	4/2	2/*	**/*	-/*
D) by watching or listening and then thinking about it	50/41	43/47	1/9	3/3	3/1	-/-	-/*
E) in a formal teacher-classroom situation	19/12	40/36	10/31	20/12	11/8	1/1	-/*
F) by gathering as much information as I can find and then teaching myself	49/45	35/38	5/11	7/4	4/1	**/*	-/*
G) by finding self-study courses that let me set my own objectives and then moving at my own pace.	33/32	34/38	11/18	13/7	7/3	1/1	**/*

This next section is a bit different. We'd like to know how interested you might be in learning about the following topics.

BASE: ALL RESPONDENTS

Q106. Please rate whether or not you would be extremely interested, very interested, somewhat interested, not very interested, or not at all interested in learning about...[TELEPHONE: READ EACH ITEM]

[RANDOMLY ROTATE ITEMS]	Extremely	Very	Some-what	Not Very	Not at all	Don't know	Refused
A) having a healthy diet and nutrition	21/23	27/29	36/33	8/10	8/6	1/*	-/*
B) exercise and fitness	13/17	24/25	39/34	11/17	13/7	*/*	-/*
C) weight control	16/22	21/25	32/30	13/13	18/9	-/*	-/*
D) how to manage stress	22/21	24/25	30/29	12/17	11/7	1/*	1/*
E) how to measure your own personal health status	18/20	28/29	35/32	9/13	8/4	*/1	*/*
F) alternative medicine or remedies, such as acupuncture, medicinal herbs, or aroma therapy	13/16	13/22	30/29	18/20	26/12	*/1	*/*
G) how to get ahead in your job or career, or how to find a new one	9/11	9/13	18/25	20/22	43/26	*/1	1/3
H) how to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	14/34	20/36	27/21	13/6	25/3	-/*	-/*
I) basic life skills, such as reading, writing, or basic math or learning to drive	12/6	13/10	18/25	20/28	36/28	1/1	*/2
J) your favorite hobby or pastime	21/35	30/37	30/22	10/3	7/3	1/*	-/*
K) how to give back or get involved in your local community	8/7	14/18	43/40	21/22	15/11	*/1	-/1
L) how to become a volunteer in your community	6/5	10/12	38/37	23/29	22/14	1/1	-/1
M) more about arts and culture, or other personal enrichment opportunities	10/15	14/20	35/35	23/20	16/9	1/*	*/1
N) how to get more enjoyment or pleasure out of life	21/23	26/32	32/31	12/9	8/5	*/*	*/*
O) educational travel opportunities	10/16	13/22	30/28	20/21	25/12	1/1	*/1
P) more about spiritual or personal growth	20/20	23/22	31/32	14/16	12/9	*/*	-/*
Q) more about understanding and getting along with others	18/11	21/26	42/39	11/16	8/6	*/*	-/1

ASK Q116 ABOUT EACH ITEM IN Q106 IF "EXTREMELY OR VERY INTERESTED" (Q106=01,02)

BASE: EXTREMELY OR VERY INTERESTED

Q116. You mentioned you would be interested in learning more about [TELEPHONE: READ EACH ITEM RATED "EXTREMELY INTERESTED" OR "VERY INTERESTED" FROM Q8] [ONLINE: SOME OF THESE TOPICS]. If you wanted to learn more about [TELEPHONE: REACH ITEM ONLINE: THESE TOPICS], which of the following formats would you most prefer to use to learn about it? Would you prefer the traditional classroom format, a less formal community workshop or seminar; a tutor or pro teaching you one-on-one; joining a group interested in the topic; buying, renting, or borrowing educational material and teaching yourself; self-study course; using the Internet, or something else?

[RANDOMLY ROTATE ITEMS]	Class-room	Work-shop	Group	Tutor or Pro	Teaching yourself	Self study course	Inter-net	Else
A) Having a healthy diet and nutrition	10/4	9/15	16/11	12/6	31/25	12/14	4/23	6/2
B) Exercise and fitness	10/5	9/13	23/22	13/15	28/20	8/11	3/13	6/1
C) Weight control	10/3	10/14	26/17	16/9	20/26	9/12	2/17	7/3
D) How to manage stress	10/4	15/17	20/17	13/7	20/21	12/14	3/19	8/1
E) How to measure your own personal health status	11/3	14/17	21/11	22/11	16/22	7/14	5/22	4/1
F) Alternative medicine or remedies such as acupuncture, medicinal herbs, or aroma therapy	15/7	7/18	23/9	19/10	12/14	14/14	4/26	6/1
G) How to get ahead in your job or career, or how to find a new one	12/8	17/28	22/4	13/13	11/13	5/13	11/18	8/2
H) How to master an advanced skill, such as using a computer, becoming fluent in a foreign language, or preparing taxes	32/18	16/18	6/6	26/18	11/16	4/11	4/12	2/*
I) Basic life skills, such as reading, writing, or basic math or learning to drive	27/17	7/11	11/7	18/11	22/22	6/17	*/9	10/5
J) Your favorite hobby or pastime	6/4	18/22	20/11	11/10	26/28	7/9	4/15	8/1
K) How to give back or get involved in your local community	4/3	28/33	38/32	4/3	7/9	8/6	1/8	10/5
L) How to become a volunteer in your community	6/3	22/32	50/31	1/5	13/9	1/4	1/8	6/9
M) more about arts and culture, or other personal enrichment opportunities	15/9	21/27	23/18	4/4	14/14	6/8	4/19	12/1
N) how to get more enjoyment or pleasure out of life	6/2	17/19	33/24	8/4	14/23	12/13	3/13	8/2
O) educational travel opportunities	13/6	15/22	23/16	12/4	9/13	11/7	15/30	3/3
P) more about spiritual or personal growth	7/7	12/14	39/25	10/5	12/21	9/15	-/11	10/2
Q) more about understanding and getting along with others	9/5	16/23	37/30	9/3	16/18	7/10	*/10	7/1

BASE: ALL RESPONDENTS

Q200. These next questions are about how much you are willing to personally invest in learning about something you always wanted to learn about. By investing we mean how much time you are willing to take or how much you might be willing to pay to learn about this one thing you really want to know.

Which of the following four statements best describes how much time you are willing to invest?

	Telephone	Online
I will spend all the time it takes to learn about something I really want to know about.	21	38
I will spend some time, if I can control when and how much.	50	45
I will spend some time, even if I cannot control when and how much.	9	6
I can't spend much time to learn about something I really want to know	12	2
It depends	7	7
Don't know	*	2
Refused	*	1

BASE: ALL RESPONDENTS

Q205. How much would you be willing to pay, at most, to learn about something you are extremely interested in or have always wanted to learn more about. [ENTER DOLLAR AMOUNT, DO NOT ACCEPT RANGE]

	Telephone	Online
WOULD NOT BE WILLING TO PAY I would be willing to pay at most	\$ 878.30 (Mean) \$101 (Median)	\$ 347.10 (Mean) \$102 (Median)
Not sure[DO NOT READ]	38	-
Refused[DO NOT READ]	7	*

BASE: ALL RESPONDENTS

Q81. People experience major changes at different periods during their lifetimes. Please tell us which of the following has happened to you, personally, during the past 12 months.

<i>[RANDOMLY ROTATE ITEMS]</i>	Has Happened	Has Not Happened	Don't know	Refused
A) Having a death in your immediate family	28/25	72/74	-/*	-/1
B) Having a child go to college	11/13	88/85	-/*	*/1
C) Becoming a caregiver for a parent or elderly family member	19/17	81/80	-/1	-/1
D) Becoming a caregiver for a child or grandchild	18/14	82/83	-/1	-/2
E) Having your last child move out of your home	10/13	90/85	*/*	-/2
F) Having an adult child move back into your home	9/13	91/86	-/*	-/1
G) Making a major change in your diet or level of physical activity	35/45	65/53	-/1	-/1
H) Retiring for the first time	8/20	92/77	*/1	-/2
I) Becoming a grandparent	26/31	74/68	-/*	-/1
J) Having a major illness in your immediate family (not including yourself)	32/36	68/62	-/1	-/1
K) You personally having a major illness	23/22	76/74	*/1	*/2
L) <i>Online only:</i> Getting a degree, diploma, or certification	-/8	-/90	-/*	-/1
M) Going back to school to finish a degree or certification or to get an advanced degree or certification	5/6	95/91	-/1	-/1

ASK Q91 FOR ANY "HAS HAPPENED" IN Q81- OTHERS SKIP TO Q300

BASE: MAJOR CHANGE HAS HAPPENED (Q 81 any items 1-13=01)

Q91. How would you rate the effect this event had on your life? Would you say it had no effect at all; very little effect, a moderate effect, or a major effect on your life?

<i>[RANDOMLY ROTATE ITEMS]</i>	No effect at all	Very little effect	A moderate effect	A major effect	Don't know	Re-fused
A) Having a death in your immediate family	9/2	5/5	31/34	55/57	-/1	-/1
B) Having a child go to college	37/9	6/28	30/41	24/17	2/2	-/3
C) Becoming a caregiver for a parent or elderly family member	10/3	15/8	33/23	38/62	3/3	-/1
D) Becoming a caregiver for a child or grandchild	19/9	18/15	22/29	41/42	-/2	-/3
E) Having your last child move out of your home	16/17	21/26	34/38	29/18	-/1	-/1
F) Having an adult child move back into your home	9/5	26/25	37/38	25/30	3/2	-/1
G) Making a major change in your diet or level of physical activity	3/3	17/16	35/42	44/37	1/1	-/1
H) Retiring for the first time	12/13	16/20	28/25	44/41	-/1	-/*
I) Becoming a grandparent	13/8	17/11	28/24	42/23	-/*	-/1
J) Having a major illness in your immediate family (not including yourself)	3/5	9/6	27/34	61/52	-/2	-/1
K) You, personally, having a major illness	4/4	7/9	23/28	65/56	-/1	-/2
L) <i>Online only:</i> Getting a degree, diploma, or professional certification	-/11	-/18	-/39	-/24	-/5	-/3
M) Going back to school to finish a degree or certification program or to get an advanced degree or certification.	-/3	26/9	32/23	9/18	33/-	1/2

BASE: ALL RESPONDENTS

Only a few questions to go. This information is completely anonymous and is never reported on an individual level. We use this information to find out if people taking this survey are similar or different from the population as a whole.

		Telephone	Online
Q300.	What is your marital status?		
	Never married	6	3
	Married	62	63
	Separated or divorced	11	18
	Widowed	21	14
	Other	*	
Q305.	Are there any children or grandchildren under the age of 18 living at your home?		
	Yes	9	13
	No	91	87
Q310.	Does a parent, in-law, or other adult relative live with you at your home?		
	Yes	14	17
	No	86	81
Q320.	Are one or both of your parents still living?		
	Yes	28	30
	No	72	69
Q325.	Are you or your spouse currently a member of AARP or NRTA?		
	Yes	56	65
	No	43	33
	Don't Know	1	1
Q330.	What is your current employment status?		
	Employed full time	27	27
	Employed part time (not retired)	6	4
	Retired, working part time	6	11
	Retired, not working at all	48	41
	Unemployed (looking for work)	2	2
	Self-employed	5	7
	Other	7	7
Q335.	What is the highest level of education you have completed?		
	Some high school or less	12	7
	High school graduate	45	50
	Technical or vocational school	3	3
	Some college	14	14
	College graduate (2-year degree)	4	4
	College graduate (4-year degree)	13	13
	Graduate or advanced degree	8	8

Q340.	What is your age?	Telephone - Years (Mean)	Online - Years (Mean)
		64.0	62.7
Q350.	What was your approximate family income before taxes in 1998? This is income from for all household members from all sources including earnings, wages, Social Security, pensions, interest and dividends on investment?	Telephone	Online
	\$15,000 or less	15	17
	Between \$15,001 and \$25,000	13	14
	Between \$25,001 and \$35,000	11	12
	Between \$35,001 and \$50,000	12	14
	Between \$50,001 and \$75,000	14	15
	Between \$75,001 and \$100,000	8	9
	Between \$100,001 and \$120,000	2	6
	Between \$120,001 and \$150,000	5	3
	\$150,001 or more	4	3
	Don't Know	7	*
	Refused	9	9
Q355.	Which of the following best describes you?		
	White or Caucasian	85	86
	Black or African American	9	9
	American Indian, Aleut, or Eskimo	1	*
	Asian or Pacific Islander	1	*
	Other	3	1
Q360.	Are you of Hispanic or Spanish ethnicity or descent?		
	Yes	7	6
	No	93	91
	Don't Know	*	*
	Refused	*	2
Q365.	Are you male or female?		
	Male	46	46
	Female	54	54

