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Learning as Leisure Among Older Adults: Triggers, Motivations and Constraints of OLLI Members

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LEARNING AS LEISURE AMONG OLDER ADULTS: TRIGGERS, MOTIVATIONS
AND CONSTRAINTS OF OLLI MEMBERS

A Thesis
Presented to
the Graduate School of
Clemson University

In Partial Fulfillment
of the Requirements for the Degree
Master of Science
Parks, Recreation, and Tourism Management

by
Sara M. Baral
August 2014

Accepted by:
Toni Liechty, Committee Chair
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ABSTRACT

Individuals age 65 and older make up an increasingly large proportion of the population in the United States (U.S. Census Bureau, 2011). Due to retirement, this cohort experiences an increase in discretionary time to participate in old and new leisure activities (Nimrod, 2008). This study used concepts from Leisure Innovation Theory to investigate what happens when one participates in a new leisure activity. While participating in leisure activities, older adults experience a variety of motivations (e.g. Chen & Pang, 2012; Lamb & Brady, 2005) and constraints (e.g. Kleiber, McGuire, Aybar-Damali & Norman, 2008). The concepts of triggers, motivation, and constraints were studied to understand how older adults participate in leisure; particularly learning as leisure. Learning as leisure can be found in lifelong learning institutes (LLIs) (MacNeil, 1998; Lamb & Brady, 2005; Brady, Cardale & Neidy, 2013, etc.). Osher Lifelong Learning Institute (OLLI) is a specific type of LLI that was the setting for this study. With an email list of current and former OLLI members, an online survey was distributed looking at the previously stated concepts, demographics, and participation in OLLI. This study provided an opportunity to bridge the gap between research and practice by applying it to a real world setting. The purpose of this study was to investigate the triggers, motivations, and constraints of Osher Lifelong Learning Institute members. Findings indicated that older adults joined OLLI as a new activity due to internal triggers (e.g. to satisfy an interest about a certain topic), were motivated by cognitive interests (e.g. to learn just for the joy of learning) to continue participating, and that constraints had very little on impact their participation. The results also suggested that for the majority of participants learning as leisure, was a continuing interest that they pursued in later life through OLLI. Implications of this research can be utilized to increase membership

numbers for OLLI. Future research into scale development to quantifiably measure elements of Innovation Theory is recommended.

DEDICATION

To the people who have helped me on my ongoing quest to make “leisure legit.”

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First, I would like to thank Clemson University's PRTM faculty and staff for their help with my thesis and graduate studies. I would especially like to express my gratitude to my research committee. My committee members Fran McGuire and Dart Schmalz supplied me with a wealth of expertise and a critical eye to ensure my research was thorough and applicable. Words cannot express how appreciative I am of Toni Liechty for accepting the challenge of being my committee chair and being all in from day one. Her experiences, work ethic, and way of thinking have made her my role model. I would not have reached this academic achievement without her unwavering guidance, support, and belief in me.

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CHAPTER I

INTRODUCTION

Background

Thanks to the aging of the baby boom generation and an increasing lifespan (Weinstein, 2004) the older adult population is steadily growing and is expected to increase to 20 percent of the United States population in the next 20 years (United States Environmental Protection Agency, 2012). Traditionally, there is a reduction of participation in leisure activity when one ages (Janke, Davey & Kleiber, 2006). Reduction in activity may be due to constraints, which are often viewed as barriers to participation, yet some researchers have suggested that experiencing these constraints can result in a beneficial leisure experience (Aybar Damali & McGuire, 2013). On the contrary, some older adults maintain and even try new leisure activities (Nimrod & Hutchinson, 2010).

This study explored leisure and aging using the lens of Leisure Innovation Theory, which addresses the concept of adopting new leisure activities in later life. Innovation Theory is unique for being one of the only aging theories rooted in the leisure field (Liechty & Genoe, 2013). Innovation has four major tenants which are: 1.) innovation may be triggered by a variety of factors and generally motivated by internal and external factors; 2.) adding new activities provides opportunities for personal growth; 3.) individuals are likely to add new activities that lead to either reinvention of self or to preserve self; and 4.) adding a new leisure activity improves well-being (Liechty, Yarnal & Kerstetter, 2012; Nimrod & Kleiber, 2007). Not only is it important to study triggers of leisure innovation, it is important to understand general motivations of older adults

because they have an influence on leisure activities pursued (Janke, Davey & Kleiber, 2006).

One of the leisure activities that older adults have been participating in more frequently is learning as leisure (Lorek Dattilo, Ewert & Dattilo, 2012). Some older adults have a thirst for knowledge and lifelong learning activities have increased dramatically since the turn of the century (Weinstein, 2004). Learning as leisure can be classified formal, informal, or intentional (Roberson, 2005). Participating in home based activities is an example of informal learning and taking classes is a way to practice formal learning. One means of engaging in learning as leisure that has gained popularity in research is lifelong learning institutes (LLIs) (e.g. Brady, Cardale & Neidy, 2013; Lamb & Brady, 2005; MacNeil, 1998). LLIs represent a hybrid type of learning called nonformal because they are formal due to being affiliated with a university, but informal because they are not designed to obtain a degree or certification (Lorek Dattilo, Ewert & Dattilo, 2012). A lifelong learning institute is focused on meeting the educational needs of people aged 50 and older and as of 2005, there were over 400 OLLIs in the United States (Lightfoot & Brady, 2005). Osher Lifelong Learning Institute (OLLI) was the specific LLI examined in this study.

There have been studies looking both generally at the motivations (e.g. Chen & Pang, 2012; Lamb & Brady, 2005), benefits (e.g. Brady, Cardale & Neidy, 2013; Nimrod, 2007), constraints (e.g. Kleiber, McGuire, Aybar-Damali & Norman, 2008), and engagement (e.g. Hutchinson & Nimrod, 2012; Janke, Davey & Kleiber, 2006) of leisure activities of older adults and specifically LLIs. These studies, however, have looked at these elements individually. In some of these studies, there have been instances in which

some of these elements overlap. For instance, motivation and constraints have been used to contrast each other, yet they have not been studied together in this context. As for innovation theory, there need to be studies using quantitative methods because with one exception (Nimrod, 2008), previous studies have only used qualitative methods. To have a holistic understanding of older adults and their participation in LLIs there needs to be research that looks at these elements within the same organization.

Purpose of the Study

The purpose of this study was to investigate the triggers, motivations, and constraints of Osher Lifelong Learning Institute members. This study can provide a response to McGuire's (2000) article which suggests that researchers do not know much about leisure and aging. One of the reasons for the lack of understanding about the state of leisure and aging is "we don't put the best team together," (p. 97). This study attempted to alleviate this problem because the research team consisted of leisure and aging specialists; including McGuire. Another reason states that: "leisure research has always used concepts developed in other fields and shaped them to embrace leisure questions" (p. 97). This study used elements of a leisure-based theory to describe leisure and aging rather than one of the psychological or sociological theories other researchers have used in the past such as continuity theory, socioemotional selective theory, and selective optimization with compensation theory (Liechty & Genoe, 2013). Lastly, the fact that "we continue to struggle with the tie between research and practice" has been an inspiration for this study. By working directly with OLLI, this study used a theoretical lens to design and implement a survey for the institute, gather findings, suggest how the

findings can be applied and benefit the organization, therefore bridging the gap between research and practice.

Research Questions

In an attempt to understand the triggers, motivations, and constraints, of participation among OLLI members, the following research questions were posed:

1. What factors trigger people to join OLLI?
2. What factors motivate people to continue participation in OLLI?
3. What constraints do people face to participation in OLLI?

Definition of Terms

Constraints: Any factor interfering with the pursuit of leisure (McGuire, Boyd, Janke, Aybar-Damali, 2013, p.148)

Learning as Leisure: Pursuit of various learning experiences as desirable free-time activities (Lorek, 2009 citing Payne, 1991)

Motivation: To be moved to do something; energized and activated towards an end (McGuire, Boyd, Janke, Aybar-Damali, 2013 citing Ryan & Deci, 2000, p.54)

Older Adult: An individual with the minimum age of 50.

Osher Lifelong Learning Institute (OLLI): A membership organization whose mission is to provide opportunities for mature adults to further their knowledge in both academic and recreational pursuits and to share their experience and interests with other members (minimum age 50) (Clemson University: Osher Lifelong Learning Institute)

Trigger: The situational causes for adopting a new activity (Nimrod & Kleiber, 2007 p. 8)

CHAPTER II

REVIEW OF LITERATURE

Introduction

This literature review will cover three major topics relevant to this study. The first topic is participation in leisure among older adults including motivation and constraints. The next topic that will be reviewed is the Theory of Leisure Innovation and how it has been applied to older adults and their leisure activities. Learning as leisure will be the final topic. This section will review literature about learning as leisure among older adults, provide a description of what a lifelong learning institute (LLI) is, and specifically describe the LLI used for this study, Osher Lifelong Learning Institute (OLLI).

Leisure Among Older Adults

It is important to study older adults because the population aged 60 and over in the United States as recorded in 2012 is already over 59 million people, which makes up 19 percent of the population, and this number is steadily growing (United States Census Bureau, 2014). Marketing tactics have been directed at this population to encourage participation in leisure activities because recent retirees of today have higher education levels, more discretionary income, and fewer perceived social constraints to leisure (Liechty & Genoe, 2013). Leisure participation may benefit older adults in the aging process by providing opportunities for them to be physically, socially, and mentally active (Hutchinson & Nimrod, 2012).

Older adults participate in three general domains of leisure including informal, formal, and physical (Janke, Davey & Kleiber, 2006). Participation in informal leisure

such as socializing with friends and family remain relatively constant throughout the lifespan. Physical leisure such as sports or exercise and formal leisure such as religious groups or community activities generally decrease with age (Janke, Davey & Kleiber, 2006). Lifelong learning institutes are an example of formal leisure and were the context of older adults' leisure for this study. Participation in formal leisure has been linked to increased happiness, decreased depressive symptoms, and increased physical functioning and health status (Janke, Davey & Kleiber, 2006). Participating in learning as leisure has potential to contribute to older adults' productivity and activity (Jenkins, 2011).

Participation in leisure in general provides benefits for older adults such as structure, purpose, belonging and acceptance which in turn are important elements to maintaining physical and mental health (Burnett-Wolle & Godbey, 2007; Janke, Davey & Kleiber, 2006; Montoro-Rodriguez, Mowen & Payne, 2006). Some health benefits that result from leisure participation include a lower risk of chronic illnesses like heart disease, stroke, Type II diabetes and high blood pressure and improved psychological health such as increased happiness, decreased cognitive decline, and decreased depression (McGuire, Boyd, Janke & Aybar-Damali, 2013). Participating in leisure activities can aid in successful aging because individuals usually remain physically, socially, and mentally active to express their interests (Hutchinson & Nimrod, 2012). Studies have shown that increasing leisure satisfaction will also increase life satisfaction (Broughton & Beggs, 2007). Researchers have investigated specifically how retirees' newly adopted leisure activities provide benefits and contribute to their life satisfaction (Nimrod, 2007). Some benefits of adopting new leisure activities included growth, challenge, and companionship; which consequently have a positive effect on life

satisfaction. The six activity factors that contribute to this population's life satisfaction include: high culture, free out of home activities, spirituality and enrichment, popular culture, following generation, and independent home activities (Nimrod, 2007).

More research needs to be done on why people adopt new leisure activities (Hutchinson & Nimrod, 2012); this can perpetuate research on how to sustain the engagement of the individual and how to keep the participant coming back to the activity. One way to get a better understanding of leisure participation is to look at one of its core elements: motivation (McGuire et. al, 2013). Motivation has often been mentioned in research to understand why an older adult is participating in a particular leisure activity; specifically researchers have explored intrinsic motivation and its rewards that increase life satisfaction (Guinn, 1999).

Motivation. For older adults, achievement, social interaction, a link to work, and growth opportunity have all been found to drive leisure engagement (McGuire et. al, 2013). Leisure motivation refers to a need, reason, or satisfaction that stimulates involvement in a leisure activity (Chen & Pang, 2012). There are two general types of motivation; they are intrinsic: "doing an activity for its own sake, for the pleasure and satisfaction derived simply from performing it," (p. 236) and extrinsic: "pertains to a wide variety of behaviors that are engaged in as a means to an end and not for their own sake," (p.237) (Alexandris & Tsorbatzoudis, 2002).

To understand leisure motivation is to understand why individuals become involved in certain leisure activities and patterns and how leisure is associated with constraints negotiation, and culture. Various researchers have interpreted leisure motivations from different perspectives. For instance, some of the meanings of leisure

for older adults which influence motivation include: solitude, intrinsic satisfaction, diversion, relaxation, intellectual challenge, health, personal competence, expression and personal development, creativity, social interaction, opportunity for service, and social status (McGuire et al., 2013). Furthermore, McGuire and colleagues stated that actual or anticipated benefits influence motivation (2013). As for the older adult population specifically, Nimrod (2007) conducted a study on recent retirees and the link between engagement and benefits. In addition to benefits, constraints have an impact on motivation.

Constraints. Motivation has been found to interact with constraints and benefits (Chen & Pang, 2012). Leisure constraints have been classified in to three types: intrapersonal, interpersonal, and structural. Examples of these constraints among older adults would include shyness (intrapersonal), loss of spouse (interpersonal), and transportation and financial support (structural) (Kleiber, McGuire, Aybar-Damali & Norman, 2008). Constraints can be in the form of gender roles, peer expectation, cultural norms, racial discrimination and prejudice, lack of leisure facilities or any other factors rooted in a specific social-cultural context (Crawford, Godbey & Shen, 2010). In addition, some of the constraints older adults encounter when participating in leisure are lack of free time, financial limitations, care-giving responsibilities, and poor health (Liechty & Genoe, 2013). Researchers have suggested that the field would benefit from more research into constraints later in the life course such as when transitioning retirement and beyond (Crawford, Godbey & Shen, 2010).

Further research on leisure constraints and aging can provide insight into areas of concern such as physical ability, health restrictions, and instability of leisure activity

selection (Crawford, Godbey & Shen, 2010). For the older adult population, health conditions may pose a constraint (Nimrod & Hutchinson, 2010). However, the conceptualization of constraints has evolved beyond the idea that they are simply barriers to participation. Often times, constraints have had a negative connotation, but especially with older adults, constraints can actually be enabling and beneficial (Kleiber, McGuire, Aybar-Damali & Norman, 2008). For example, having too many choices can be psychologically damaging and reducing those choices may be beneficial. According to Schwartz (2004), “we would be better off if we embraced certain voluntary constraints on our freedom of choice, instead of rebelling against them,” (p. 344). Kleiber and colleagues (2008) also stated that choice can be overwhelming, and constraints be can a restriction in freedom in one sense, but enhancing in another.

There are five categories of benefits that result from constraints of leisure for older adults (Kleiber et. al, 2008). The first benefit is enhanced resilience and deepened commitment, continuing an activity and surpassing adversity strengthens one’s sense of self and identification with the activity. Second, constraints help utilize energy by accepting a constraint rather than resisting it, thus focusing attention to other goals. Older adults who experience constraints may also experience a changed attitude toward life and leisure. In addition, a leisure constraint can cause the benefit of intentional-self constraint for goal achievement. Lastly, constraints can lead to the discovery of activities that have not been previously attempted.

Theory of Leisure Innovation

With the increase of the older adult population, there have been many theories used to understand leisure and aging (Liechty & Genoe, 2013). One of the more recent

theories of leisure and aging used to provide perspective in this study is the Theory of Leisure Innovation developed by Nimrod and Kleiber (2007). One of the first studies that explored leisure innovation used participants in a lifelong learning institute. According to Nimrod and Kleiber (2007), “Because of the general good health and orientation toward learning and engagement in members of the [Learning in Retirement] group, we felt that it offered the best context for studying the conditions and consequences for various patterns of innovation,” (p. 6). Leisure innovation is when a new leisure activity is adopted later in life. Depending on the perspective of the participant, the new activity could be completely new to the individual or can be similar to a previous or current activity (Nimrod & Hutchinson, 2010). This concept is particularly relevant to this study because although membership in OLLI is by definition a new activity for individuals over the age of 50, learning as leisure may not be an entirely new activity. Therefore, there is potential that participants are experiencing leisure innovation at OLLI because they are participating in a familiar activity, but in a new setting.

One assertion of leisure innovation theory is that adopting a new activity “provides personal growth, renewal of previously held interests and reconstruction of identity,” (Liechty, et al., 2012, p. 391). Leisure innovation suggests that by adding new activities, participants have the opportunity for reinvention of self or preservation of self. Self-reinvention innovation means that participation in the new activity has nothing in common with the individual’s history and self-preservation innovation states that the activities that are being participated are consistent with old interests, skills, and/or relationships (Nimrod & Kleiber, 2007). Lastly, leisure innovation has the potential to

improve the well-being of older-adults by increasing the feeling of being active, dynamic, vital, daring, and youthful and by broadening and deepening the sense of meaning in life (Liechty, et al., 2012).

Innovation theory has been applied to studies exploring life satisfaction among a general population of retirees (Nimrod, 2008), older adults with chronic health conditions (Nimrod & Hutchinson, 2010), retirement-age women (Liechty, Yarnal & Kerstetter, 2012), and older men's perceptions of leisure and aging (Liechty & Genoe, 2013). This study has an opportunity to provide insight into innovation theory by exploring triggers and gender differences for learning as leisure through formal leisure like OLLI.

Nimrod and Kleiber (2007) state that triggers can be situational or unexpected causes for adding a new leisure activity. Triggers should not be confused with motivations which is when an individual is moved to do something; energized and activated towards an end (McGuire, et. al, 2013) and/or a need, reason, or satisfaction that stimulates involvement in a leisure activity (Chen & Pang, 2012). Innovation can be triggered by internal motivations such as curiosity, interest, or desire to do to an activity for a long time and external motivations such as social circumstances, having the time and money to participate in the activity, and the availability of the activity itself (Nimrod & Kleiber, 2007). Other triggers in this specific study included filling time, maintaining good health, increased income and improving skills and health limitations also known as imposed triggers (Nimrod & Kleiber, 2007).

In the seminal article about leisure innovation, Nimrod and Kleiber (2007) found in their study that the activities that attracted the most innovation were volunteering and intellectual activities such as classes. An interesting finding in this study was that there

was more than double the amount of external triggers than internal triggers in their sample (Nimrod & Kleiber, 2007). Regardless of their triggers, participants experienced a high level of well-being for the following reasons: relief from work, independence, general circumstances, companionship, activities, and meaning (Nimrod & Kleiber, 2007).

One of the main reasons Nimrod (2008) wanted to conduct a study about innovation theory, older adults and life satisfaction was to battle the mindset that people slow down with age and do not participate in leisure activities anymore (or participate in reduced levels) and substitute them with less challenging alternatives. Leisure activities have provided a number of benefits for older adults; a large number of these benefits are regarding the status of one's health. Nimrod (2008) cited Thompson's (1992) finding that those who adopt new activities report that these activities bring special enjoyment and happiness to their lives. One of Nimrod's (2008) main findings was that there was a strong positive association between the level of leisure innovation (i.e., the number of new activities adopted) and self-related health. In addition, Nimrod's (2008) findings stated that innovators had significantly higher life satisfaction than non-innovators.

Nimrod and Hutchinson's (2010) study on innovation among older adults with chronic health conditions focused on leisure constraints, benefits, and motivational triggers. This study examined, "new activities after the onset of a physical health condition, and focused on the patterns, meanings and perceived benefits of innovation in leisure activities as an integral part of the process of coping with declining physical health" (Nimrod & Hutchinson, 2010, p. 2). Participants in this study discussed their triggers for adopting new activities in semi-structured interviews. Internal motivation for

participating in an activity included those who, “wanted to see what it was all about” or had been “always interested in” a particular activity whereas external motivation was present when it was someone else’s initiation such as being recommended to take an activity or exposure to media (e.g., participating in Red Hat Society after reading about it in the newspaper). Instrumental triggers were related to maintaining or improving health, staying busy, or being money conscious. The authors summarized that activities that were creative or intellectual were internally triggered and activities that were physical were instrumentally triggered.

All participants expressed that the new activities helped them feel better about themselves (Nimrod & Hutchinson, 2010). Participants were excited about their capability to partake in the activities despite their health condition and that it made them feel “normal”. Another benefit derived from the innovation was a sense of pride, competence, or usefulness. Participating in the activity allowed the older adults to accept themselves and their limitations and feel that they were a contributing member of society. Another general yet crucial finding was, “while innovation among healthy adults may be either self-preservation innovation or self-reinvention innovation, the main role of innovation among older adults with chronic health condition is preserving a sense of continuity,” (Nimrod & Hutchinson, 2010 p. 21). Nimrod and Hutchinson stated that it was important to note that some people perceived themselves as “innovators” and “lifelong learners.” This statement highlights the salience of leisure innovation theory in the context of older adults participating in a lifelong learning institute.

Innovation theory has also been applied to retirement-age women (Liechty, Yarnal & Kerstetter, 2012). This qualitative article reiterated the four tenets of

innovation theory and identified three themes which were: the nature of newly adopted leisure activities, the triggers or facilitators of newly adopted leisure activities, and the outcomes of adopting new leisure activities. Participants expressed that the newly adopted leisure activities were meaningful for participants because they permitted affirmation of self-identity and exploration of new and exciting opportunities. Alongside purposive life change or intentional pursuits of self-identity as triggers for activity innovation, most participants described the triggers or facilitators of newly adopted leisure activities as internal factors rather than external factors and other women identified that modification in health status or consciousness about health as their trigger. Intrapersonal benefits such as personal fulfillment, enjoyment, and participation in new and exciting experiences were described by the women and feelings of joy, self-confidence, empowerment, independence, and social connection with friends and family were outcomes of adopting new leisure activities.

Innovation theory has also been used to explore older men's perceptions of leisure and aging (Liechty & Genoe, 2013). This qualitative study produced four major themes which include: the interplay between work and leisure, using skills to "give back" through leisure involvement, increased intentionality or purpose in leisure choices, and viewing constraints as a reflection of priorities rather than barriers. The authors of this study identified that, "most participants viewed aging positively; they considered the later years a time to increase participation in leisure, try new activities, and contribute to the community," (p. 443). Leisure innovation can be triggered by increased perceived freedom and purposive life change yet in this study, the participants used leisure innovation to preserve a sense of identity and rarely used it to describe some of the

traditional outcomes of leisure innovation such as to re-invent or establish a new sense of identity (Liechty & Genoe, 2013).

Innovation theory is ideal for exploring leisure and aging because this theory originated from the leisure field and studies have indicated that specifically around the transition to retirement, older adults pursue new leisure activities thus leading to a multitude of benefits such as increased life satisfaction (Nimrod, 2008). Since this theory is still relatively new to the field, researchers have suggested future research be on the typology and influences on a more diverse sample and a broader population. In addition, influence of individual (e.g., personality) differences and personal and social constraints can be considered (Nimrod & Kleiber, 2007). As several recent qualitative studies have identified new insights, there also needs to be more quantitative research with leisure innovation theory (Nimrod, 2008). OLLI is an appropriate environment to apply Leisure Innovation Theory because it is an organization designed specifically for those in later life and because individuals have the opportunity to take a course that is brand new to them or to rediscover an old interest.

Learning as Leisure among Older Adults

Boredom and loneliness sometimes occur in older adults once they retire; one way to alleviate this problem is through programs and services that provide learning opportunities (MacNeil, 1998). The relationship between learning and leisure dates back to ancient Greek world views, in fact, the Greek word for leisure, *scholē*, is the origin for the English words for “school” and “scholar” (MacNeil, 1998). The Greeks viewed learning as a special gift to the humans from Zeus and believed that engagement of the mind through activities such as reading, writing, and other various creative efforts

fulfilled a divine purpose (MacNeil, 1998). The Greeks associated leisure with personal freedom, an essential component for contributing to a virtuous life (MacNeil, 1998).

Learning as leisure can be accomplished through self-directed learning. Self-directed learning is intentional, self-planned, the individual is in control of the process, and it can be a way of negotiating adjustments in work, family, and health (Roberson, 2005). With adults living longer, there is a greater amount of time spent in retirement to participate in leisure; and older adults often utilize self-directed learning as leisure to adjust to change in life. Adult education provides opportunities to learn and enrich life, especially in recreational and leisure pursuits. Not only are older adults filling their leisure time with learning, it also presents an opportunity to be highly engaged. This engagement can be experienced through enjoyment, excitement and passion for the topics being learned. Similar to older adults participating in general leisure activities, being involved in an educational setting has a multitude of benefits such as: perceived enjoyment; help adjusting in later life; alleviation of disengagement by filling the void left by deceased spouse, grown children, or retirement; having the opportunity to learn new things; and, acquiring new skills (Lightfoot & Brady, 2005). Learning as leisure can also provide opportunities for older adults to grow and develop, as well as increased sense of meaning, purpose, and accomplishment in life. Finally, participation in learning as leisure can lead to health benefits through social interaction, physical activity, and reduced depression and boredom.

Characteristics of a lifelong learning institute. The idea of creating a learning institute for older adults originated in 1962 when a group of retired New York City public school teachers sought out assistance from the New School University to design a

program for them (Lightfoot & Brady, 2005). There are various types of lifelong learning institutes (LLIs) available in the United States today, but most of them follow the same basic guidelines. The first characteristic is that there is an element of self-governance and autonomy. The curriculum consists of the interests of the participants and is influenced by the liberal arts. An important element of LLIs that is different from traditional learning environments is that the teachers are peers in age with their students. In addition, these teachers are most likely experienced faculty, retired from teaching, or community members that have specific knowledge in the course topic. Another crucial element that makes LLIs unique is that the age minimum of 50 or 55 is enforced. Lifelong learning institutes usually have an affiliation with a college or university. The student body is usually better educated and more affluent than the general population of people older than 50. Finally, the last characteristic is the strong sense of ownership of the programs by its members resulting in active volunteering in teaching the courses, managing the organization and planning events and curriculum.

In 2000, The University of Southern Maine had an LLI which attracted the attention of Bernard Osher, a native of Maine and a philanthropist living in San Francisco, who donated a substantial amount of money to the University's LLI program which subsequently changed the name to Osher Lifelong Learning Institute (OLLI) to honor and recognize his contribution (Lightfoot & Brady, 2005). The Osher Foundation supports 117 LLIs on university and college campuses nationwide with at least one grantee in every state and the District of Columbia (The Bernard Osher Foundation). The National Resource Center at University of Southern Maine is used to provide information on effective programming for the OLLIs throughout the United States, manage their

website, plan and facilitate an annual national conference, and conduct research about older learners and LLIs (Brady, Cardale & Neidy, 2013)

Harrison and McGuire (2008) used a combination of two frameworks to start an LLI in South Carolina. The first was Manheimer and Moskow-McKenzie's (1995) six suggestions which included: commitment of at least one administrative champion who will take the lead in promoting the idea, approval and enthusiasm from a group of influential older learners, response to a request for the program from older learners, special opportunity through a financial gift or fund, congruence with the host institution's mission, goals, and ongoing programs, and institutional affiliation. Another guide Harrison and McGuire (2008) used was Austin's (2000) "seven C's of successful collaboration" which are: connection, clarity of purpose, congruency of mission, strategy and values, creation of value, communication between partners, continuous learning, and commitment. In their proposal, Harrison and McGuire (2008) reported that their own OLLI included 14 classes that would be offered and it would be housed under their university's Department of Parks, Recreation, and Tourism Management. The creation of OLLI at this university was commenced because there was a need for it (Harrison & McGuire, 2008). The program would initiate with financial and logistical support from the university (Harrison & McGuire, 2008). Finally, they forecasted that the LLI would be self-supporting and members would pay a fee to take classes and this in turn would pay for a program coordinator and other costs that the organization may occur (Harrison & McGuire, 2008).

Involvement in LLIs. Depending on the LLI, classification of a leisure learner is varied. Arsenault (1998) conducted a study to develop a typology of older adults who

enjoy learning as a form of leisure and identified six types of leisure learner participants derived from Elderhostel, a type of LLI. The first type of learner is activity-oriented; this participant is involved in physical activity and enrolls in courses that involve the outdoors and nature. Geographical guru is the next identified leisure learner; this means that the individual wants to visit a particular geographic area or region. The experimenter is interested in all the classes available in the leisure learning setting. The adventurer differs from the experimenter because this participant is willing try going anywhere and tries anything with experiences in learning, socializing, and travel. Older adults who search for specific sites that provide a particular program, like going to a university setting for quality instruction and socializing with people who share the same passion are content-committed leisure learners. The final typology of a leisure learner is the opportunist whom other leisure learners label as a fraud and may not be as welcomed as those who are truly committed.

In addition to taking courses, one of the main ways in which members participate in LLIs is through volunteering, which often instills a sense of ownership with the institute (Brady, Cardale & Neidy, 2013). Volunteering occurs in various leisure settings and the volunteers engagement can be sustained or episodic (Lockstone-Binney, Holmes, Smith & Baum, 2010). Core elements of volunteering include free will, availability of awards, formal organization and proximity to the beneficiaries. Many aspects of volunteering as leisure have been studied including: volunteer profiles, motivations, and expectations, experiences and satisfactions, aspects of commitment, comparisons between paid staff and volunteers, and trends and management issues in volunteering settings (Lockstone-Binney, Holmes, Smith & Baum, 2010). In a comprehensive review

of the literature, Lockstone-Binney and colleagues concluded that older adults volunteer at high levels (more than 15 hours per week). Older adults volunteer because they want to “help others,” to “feel useful or productive,” and “fulfill a moral responsibility (Okun, Barr & Herzog, 1998), and due to an underlying altruism (Kim & Hong, 1998). Older adults often volunteer in small local programs like churches, schools, and libraries, large national programs (e.g., volunteers in service to America), and informal (e.g., transportation and babysitting).

Motivation to participate in LLIs has been studied by various researchers (e.g. Brady, Holt & Welt, 2003; Lamb & Brady, 2005; Lightfoot & Brady, 2005; Lorek Dattilo, Ewert & Dattilo, 2012). Lorek Dattilo et al., (2012) examined outcomes in adult free time learning and their motivation to learn as a form of leisure which is rooted in intellectual stimulation and development of social opportunities and networks and outcomes. This study was not conducted exclusively for older adults, but it was concluded that there are differences in motivations by age group. Their study suggested that adults of all ages are motivated by intellectual stimulation. The differences they encountered were that emerging adults were motivated to participate in courses to escape boredom, loneliness, and frustrations of everyday living and later-life adults were motivated least by social stimulation.

Lamb and Brady (2005) identified four categories of benefits that result from participating in an OLLI that keep members engaged which were: intellectual stimulation, experiencing a nurturing and supportive community, enhancing self-esteem, and having opportunities for spiritual renewal. Participants who experienced the benefit of intellectual stimulation emphasized the “joy of learning,” and stated other positive

anecdotes towards OLLI being, “an aphrodisiac for the mind” and “it’s interesting in that not being required to do something, you tend to do more work on your own.” The last particular quote is in reference to policy that most OLLIs do not use grades. The social support within OLLI allowed people to feel safe in taking intellectual and emotional risks. Four areas of self-esteem emerged from this study which included intellectual capacity, social roles, having a social status and voice, and self-perceptions about aging. Spiritual Renewal was promoted by two underlying motivations which were: a need to go beyond a participants own formal religious training and desire to understand other spiritual traditions. Other studies have cited learning followed by social interaction or sense of community as frequently reported motivation for members to return to LLIs (Brady, Cardale & Neidy, 2013).

Finally, some research has highlighted that the motivation to participate comes from the unique aspects of specific LLIs such as the courses or instructors. Brown, Rachelle, Maria & Acker-Hocevar (2002) highlighted the importance of instructors when they surveyed 424 senior LLI students and found that the strongest predictor of persistent participation was a positive response to the item “I like the instructors.” Lightfoot and Brady (2005) stated the importance of the quality of the teachers by stating that when the skills and knowledge of the professors are not sufficient, their class size was shrinking by fifty percent the second or third week. The authors also noted one peer teacher who directly asked his students why they signed up for his course so he could understand the learners’ motivations and tailor the class to their needs.

Summary

The concepts of motivations and constraints, and leisure among older adults have been recognized in the literature but have not been thoroughly explored in a learning as leisure context, and have not been studied together in the context OLLI. Triggers also have not been studied in the OLLI context, yet, this variable needs to be studied to understand why older adults adopt a new learning as leisure activity. Due to the age restriction of OLLI, joining this organization by definition is a new activity because one is not allowed to until the age of 50. More research is needed, however to understand what type of innovation, is occurring in this LLI. In addition, more attention should be brought to sustaining the engagement of the participants of OLLI. LLIs, especially OLLI are a unique leisure activity for older adults due to the myriad of benefits, because they are customizable to preferences, and for their high numbers of peer volunteers. Brady, Cardale and Neidy (2013) express that evaluation plays a significant role in OLLI programs. Using these variables concurrently in this study will aid in evaluating the leisure of older adults at Osher Lifelong Learning Institute. The purpose of this study was to investigate the triggers, motivations, and constraints of Osher Lifelong Learning Institute members.

CHAPTER III

METHODOLOGY

Participants

Participants in this study consisted of men and women who have at one point been a member of OLLI at Clemson. According to Clemson's OLLI homepage, a member must be a minimum age of 50. After speaking with both the current and incoming board presidents and the director of OLLI, they estimated that the average age of the OLLI participant was in the late 60s to early 70s. They also stated that the majority members were "transplants" in that they are not originally from the Clemson area or from the state of South Carolina. Clemson University is one of 117 universities that support Osher Lifelong Learning Institute (Osher Lifelong Learning Institutes). In the inaugural year of 2004, OLLI at Clemson had 414 members (Osher Lifelong Institute). Each year membership has increased and had peaked at 2010 with 1,201 members (Osher Lifelong Institute). Since 2010, membership has decreased to 1,153 in 2011 and 1,065 members in 2012. The objective of this study was to understand what triggers people to sign up for OLLI, what keeps them around, and what constrains their participation. Therefore, recruitment was done through OLLI's weekly e-newsletter which was received by current and former members.

Clemson OLLI

According to the OLLI Clemson catalog, not only do they offer courses, they offer events such as the "Annual Membership Meeting," "Summer 2014 Kick-Off Event," "Free Friday Events" and "Technical Insights" (Osher Lifelong Learning Institute at Clemson University), which allow participants an opportunity to socialize and

learn more about OLLI. The “Summer 2014 Kick-Off Event” allows members to meet summer instructors, renew membership, register for summer courses, and win door prizes. For the “Free Friday Events” each Friday provides a different topic such as “House Plant Care Clinic,” “Diet is a Four Letter Word: Let’s Talk Nicer,” and “The World of Transportation.” Fridays are offer “Technical Insights” in which members can drop in between 10:00 am to 12:00 pm and ask for assistance with technology. Clemson OLLI also provides opportunities to help the community by donating to a local organization for people in need and provides interest groups such as Mah Jongg, book club, and writers group, and painting group.

The catalog breaks up the courses into 14 topics including: courses and digital photography; culture and travel; economics, politics, and government; excursions; fine arts; health and fitness; history; home and garden; language arts; nature and environment; outdoor adventures; psychology, philosophy, and religion; and, science and technology. Courses can vary by being one day long or go on for an entire month. How long the class runs per session also varies. For instance, on June 12th, there was a class that was for one day called “Where Should we Go Next Weekend” that ran from 10:00 am to 4:00 pm. In the same catalog there was a course offered called “The Pleasures of Language” that was held every Wednesday starting from May 14th through June 18th from 11:00 am to noon. Not all the courses are held at one central location either. Some are held at the Clemson OLLI headquarters, some are at other educational or activity facilities in the area. Courses in the excursion or outdoor adventures are held at destination specific places like Smoky Mountain Railroad, Highland Botanical Gardens, or Holly Springs Country Store. Members can register for classes online, in person, and by mail.

Data Collection

A link to an online survey was sent to the OLLI director which was then emailed through their email list serve which had more than 1800 active email accounts. The survey was sent out as part of the e-newsletter on June 2nd and June 9th. To increase the sample size, I took the email introduction that was sent out in the e-newsletter and from it, created flyers. I dropped off those flyers during a weekend event at OLLI on June 11th and then the link to the survey was sent out one more time in the e-newsletter on June 16th and was finally closed on June 20th.

The e-newsletter notice and flyer directed participants to an online survey. When participants clicked the link to the survey a page appeared describing the purpose of the study, what the questions were about, how long the survey it would take to complete, the risks and discomforts, possible benefits, privacy and confidentiality, and a way to contact the primary investigator. This page constituted the informed consent (see appendix G). The survey took approximately 15 minutes to complete. Questions addressed triggers, motivations, constraints, participation in OLLI, demographics, and questions about OLLI as an organization. Most questions were set to a 5 point Likert scale, some questions were multiple choice questions and the rest were open ended questions.

Instruments

Participation in OLLI. Several questions asked about participation in OLLI which included membership (how long they had been members and if they planned on renewing their membership), volunteering (if they volunteered and what volunteer roles they fulfilled), satisfaction with OLLI, and level of engagement (see appendix B).

Triggers. Triggers referred to what had inspired individuals to begin participating in the leisure activity (i.e., to initially join OLLI). Because no validated scale exists to measure triggers of leisure innovation, items were derived from existing qualitative research. In a qualitative study conducted with an organization called *Learning in Retirement* (LIR), the authors concluded that there were four types of triggers which are: internal, external, instrumental, and imposed (Nimrod & Kleiber, 2007). Only the first three types of triggers were used in the questionnaire because the imposed triggers were too similar to that of the constraints questions that were asked. Nimrod and Kleiber (2007) listed examples of internal triggers as: curiosity, interest, and desire to do a certain activity for a long time and freedom to join. Freedom to join was also a common internal trigger from Liechty and colleges' (2011) study on leisure innovation among retirement-age women. Examples of external triggers identified in previous qualitative research include: social circumstances, having the time, and activity's availability (Nimrod & Kleiber, 2007). Statements were set to a 4 point Likert scale with the order of: no influence, little influence, moderate influence, and heavy influence (see appendix C for the items and instructions).

Motivations. Motivations referred to the factors that sustained participation in OLLI. Questions were derived from Kim and Merriam's (2004) study on motivations for learning among older adults in a learning in retirement institute. The scale Kim and Merriam (2004) used was a tailored version of the Education Participation Scale (EPS) by Boshier (1991). Coefficient alphas ranged from .76 to .91 and the scale was found to be psychometrically sound (Boshier, 1991). Kim and Merriam modified the EPS based on suggestions from the president and board directors of the learning in retirement

institute, and the final product contained four factors which were: social contact (participation to meet people and make friends), family togetherness (participation to improve or sustain familial relationships), social stimulation (participation to escape or avoid isolation, boredom, or loneliness), and cognitive interest (participation to pursue knowledge based on intrinsic reasons). Questions were set to a 4 point Likert scale which includes: no influence, little influence, moderate influence, and heavy influence. The questions and introduction of this section are provided in appendix D.

Constraints. Constraints questions originated from a 2012 presentation on former members of OLLI at UNC Asheville. Some of the questions were general limiting factors to participation in OLLI (e.g. found other interests, health reasons, and too far to drive) and others were limiting factors specifically related to OLLI (e.g. not enough courses of interest, cost of course, and no evening/weekend course). Introduction and questions of this section are demonstrated in appendix E.

Demographics. Demographic questions in the survey included: current age of the respondent, sex, zip code (which was used to determine the current city in which the individual resided), highest level of education completed, marital status, and employment status (see appendix F).

Opinions of OLLI. Finally, there were four open ended questions about the member's perception of OLLI including: how did you learn about OLLI?; what expectations did you have of OLLI?; in your opinion, what do you see as the mission of OLLI?; and do you have any other comments? These questions allowed the respondents to share their opinions and feelings without the limitations of pre-determined response

options. The director and board presidents requested these questions and the responses will be useful for OLLI in branding and marketing themselves.

Data Analysis

The statistical software SPSS was used for all quantitative analyses. Basic information such as participation in OLLI and demographics were analyzed item by item for descriptive statistics about the sample. The open ended questions were analyzed using open coding.

Further data analysis was guided by the research questions.

What factors trigger people to join OLLI?

Because the items related to triggers were taken from previous qualitative studies rather than a validated scale, triggers were analyzed item by item using descriptive statistics such as frequencies, means, and standard deviations. This was done to see which items were more highly ranked and which were less highly ranked. To see if different groups of people ranked triggers differently, t-tests were performed to compare the triggers between men and women and to compare members and non-members.

What factors motivate people to continue participation in OLLI?

Participants were given a score for each of the four subscales (cognitive interest, social contact, social stimulation, and family togetherness) and for the motivation scale as a whole. Subscales were analyzed using descriptive statistics such as frequencies, means, and standard deviations to see which subscales were more highly ranked and which were less highly ranked. They were also analyzed with t-tests to see if there were differences on the subscale scores for members and non-members and for men versus women.

Motivations were also analyzed item by item using descriptive statistics such as frequencies, means, and medians. This was done to see which items were highly ranked.

What constraints do people face to participate in OLLI?

Because items related to constraints were not grouped into subscales and did not come from a validated scale, constraints were analyzed item by item for descriptive statistics such as frequencies, means, and standard deviations. This was done to see which items were more highly ranked and which were less highly ranked. T-tests were also performed to compare the constraints between members and non-members, and between men and women.

CHAPTER IV

FINDINGS

Demographic Information

Of the 92 responses, 82 participants reported their age. The youngest respondent was 54 and the oldest was 89. The mean age was 67 years old. The data indicated that almost three quarters of the sample was female. For marital status, the majority of the sample is married (64 of the 82 who responded to the question). It was useful to know the education level of OLLI participants being that OLLI is a learning as leisure activity. All 82 respondents of this question had at least some college experience (10 skipped this question) and the majority of the sample (46%) had a graduate school degree. The table below provides details about the demographic information.

Table 1: Demographics

	<u>Percent of Sample</u>
Sex	
Female (N = 61)	74.4%
Male (N = 21)	25.6%
Marital status	
Married (N = 64)	78.0%
Divorced (N = 6)	7.3%
Widowed (N = 8)	9.8%
Unmarried (N = 4)	4.9%
Education Level	
Some High School (N = 0)	0.0%
High School Diploma (N = 0)	0.0%
Some College (N = 11)	13.4%
College Degree (N = 21)	25.6%
Some Graduate School (N = 12)	14.6%
Graduate School Degree (N =38)	46.3%

Membership Information

Learning as leisure can take place in a specific environment such as a museum, community center, or sports facility (Weinstein, 2008) or be self-directed learning when an individual initiates personal learning on specific topics like studying the Bible or landscaping (Roberson, 2005). Despite OLLI membership being limited to older adults, it was important to explore how “new” learning as leisure was to the participant. More than three quarters of the sample reported that they had participated in learning as leisure prior to joining OLLI suggesting that this was an activity they were familiar with and that OLLI was simply a new organization/setting in which to participate.

The reason why there were three options for membership status rather than just “yes” or “no” was because the e-newsletter was not limited to OLLI current and former members. Local newspapers and organizations have access to this newsletter and therefore, may not actually be a member. However, no participants reported that they had never been members of OLLI; 90 indicated that they were current members and 12 reported that they were former members. The former members had a variety of personal responses for not renewing their membership such as: “husband illness,” “travel too much to attend classes,” and “not sure.” Yet several responses were related to the class selection of OLLI or OLLI as an organization such as “classes I took were not what I expected,” and “...very cliquish [and] not welcoming of new members.”

Although 12 participants were no longer members, 80 out of 88 respondents stated that they intended to renew their membership (4 people skipped this question). Furthermore, most of the participants had been a member of OLLI for more than four

years. Although Clemson OLLI is still relatively new (10 years) the majority of the members have probably been there since its creation.

Not only had most of the participants been members for an extended period of time, the majority (86 out of 90) of participants who responded to the item reported that they were at least somewhat engaged.

Additionally, 72% of the respondents reported that they were at least somewhat satisfied with their participation in OLLI. The majority (39.6%) report that they are very satisfied with OLLI. It seemed possible that triggers, motivations or constraints might predict perceived engagement or satisfaction with leisure, therefore, Pearson's Correlation were performed to test for these relationships, but none were statistically significant.

The table depicted below demonstrates the participants' responses to their involvement including OLLI.

Table 2: Membership Information

	<u>Percent of Sample</u>
Learning as Leisure	
Yes (N = 69)	77.5%
No (N = 20)	22.5%
Membership Status	
Current member (N = 80)	87.0%
Former member (N = 12)	13.0%
Never a member (N = 0)	0.0%
Membership Tenure	
Less than one year (N = 10)	11.1%
1 – 2 years (N = 22)	24.4%
3 – 4 years (N = 28)	31.1%
More than 4 years (N = 30)	33.3%
OLLI Engagement	
Not Engaged (N = 4)	4.4%
Somewhat Engaged (N = 49)	54.4%
Engaged (N = 26)	28.9%
Very Engaged (N = 11)	12.2%
Satisfaction with OLLI	
Very Unsatisfied (N = 14)	15.7%
Somewhat Unsatisfied (N = 11)	12.4%
Somewhat Satisfied (N = 35)	39.3%
Very Satisfied (N = 29)	32.6%

Triggers

This section of the survey inquired about why respondents started participating in OLLI, also known as triggers, a tenant of Leisure Innovation Theory (Liechty, Yarnal & Kerstetter, 2012; Nimrod & Kleiber, 2007). The instructions in this section of the survey specified that participants should indicate why they had joined OLLI initially. The table below shows the top four highest scored and the lowest scored trigger items with the mean of each item and standard deviation. They scored a 1 for no influence, 2 for little influence, 3 for moderate influence, and a 4 for heavy influence.

The four highest responses were: *to satisfy my curiosity in a certain topic* ($M = 3.32$), *to satisfy my interest about a certain topic* ($M = 3.29$), *because I had the time* ($M = 2.99$) and *because of the activities available* ($M = 2.98$). It is important to note that *to satisfy my interest about a certain topic* and *to satisfy my curiosity in a certain topic* were internal triggers; *because of the activities available* and *because I had the time* represent external triggers (Nimrod & Kleiber, 2007; Nimrod & Hutchinson, 2010). *Because of increased income* scored the lowest with 71 people saying that this factor had no influence on initiating their participation in OLLI.

Some literature has suggested that there may be differences between men and women as to what triggers motivation, a t-test was performed to see if the trigger items differed between the groups. Similarly, a t-test was performed to test for differences between members and non-members. See table below for more information on trigger items.

Table 3: Triggers

Internal Triggers	Mean	Standard Deviation
To satisfy my curiosity in a certain topic (N = 85)	3.32	.903
To satisfy my interest about a certain topic (N = 85)	3.29	.884
Because I had the freedom to join (N = 85)	2.82	1.060
Because I've been wanting to try OLLI for a long time (N = 83)	2.01	.956
External Triggers		
Because I had the time (N = 83)	2.99	1.006
Because of the activities available (N = 83)	2.98	.937
Because I heard about it (N = 83)	2.53	.967
To make new friends (N = 84)	2.15	.988
Instrumental Trigger		
To improve skills (N = 83)	2.70	1.033
To keep me occupied (N = 83)	2.29	.957
To improve my health (N = 82)	1.63	.839
Because of increased income (N = 84)	1.19	.478

*Note: N refers to the number of participants who responded to that particular item

Motivations

For this study, motivation is defined as to be moved to do something; energized and activated towards an end (McGuire et. al, 2013). The motivation questions originated from Kim and Merriam's study on motivations for learning among older adults in a learning in retirement institute (2004). The scale the authors used was a tailored version of the Education Participation Scale (EPS) by Boshier (1991). Participants in the current study were instructed to consider why they had continued participating in OLLI (as opposed to why they had joined initially) as they responded to items.

Participants were given a total score out of 16 for the motivation scale. The total motivation scores had an overall mean of 12.00 and a standard deviation of 2.39. Furthermore, the motivation scale to have a Cronbach's alpha of .889 in this sample, which suggests that the scale is a reliable measure of motivation. Then, all 24 items were divided into four sub scales. Cognitive interest referred to participation to pursue knowledge based on intrinsic reasons. Social contact referred to participation to meet people and make friend. Social stimulation referred to participation to escape or avoid isolation, boredom or loneliness. Family togetherness referred to participation to improve or sustain familial relationships. The highest ranking subscale was cognitive interest ($M = 18.77$). Furthermore, the three items that had the highest average rating were all cognitive interests, including: *to learn just for the joy of learning* ($M = 3.34$), *to expand my mind* ($M = 3.34$), and *to satisfy an enquiring mind* ($M = 3.31$). The lowest scoring subscale was the family togetherness ($M = 7.40$). The subscales were tested for reliability and three out of the four subscales were (Cognitive Interest: $\alpha = .860$, Social Contact: $\alpha = .971$, Social Stimulation: $\alpha = .862$). The Cronbach's alpha for the Family Togetherness subscale was .628, however, this score is adequate.

Since there was a large disparity in the number of male respondents and the number of female respondents and because literature suggests that men and women may have different motivations for leisure innovation, a t-test was performed to see if the subscales differed for the groups. The data suggested that women had a significantly higher mean ($M = 19.31$) score for cognitive interest in comparison to men ($M = 16.95$) ($p < .05$) suggesting that women are more highly motivated by cognitive factors than men. There was also a large difference between the number of members and non-members, so t-tests were performed to see if these groups differed on any of the subscales, however, none of the tests were statistically significant.

The table below provides more information on the subscales and individual items.

Table 4: Motivations

	Mean	Standard Deviation
Cognitive Interest Items	18.77	3.717
To learn just for the joy of learning (N = 83)	3.34	.785
To expand my mind (N = 83)	3.34	.720
To satisfy an enquiring mind (N = 83)	3.31	.748
To acquire general knowledge (N = 82)	3.26	.699
To seek knowledge for its own sake (N = 83)	3.13	.866
To get something meaningful out of life (N = 82)	2.46	1.021
<i>Cronbach's Alpha: .860</i>		
Social Contact Items	12.78	5.005
To meet new people (N = 82)	2.23	.947
To meet different people (N = 82)	2.21	.965
To become acquainted with friendly people (N = 82)	2.17	.927
To make friends (N = 82)	2.12	.921
To have a good time with friends (N = 82)	2.11	.956
To make new friends (N = 78)	2.04	.874
<i>Cronbach's Alpha: .971</i>		
Social Stimulation Items	9.06	3.486
To do something rather than nothing (N = 82)	2.06	1.010
To get a break in the routine of home or work (N = 81)	1.85	.976
To get relief from boredom (N = 82)	1.43	.738
To get away from loneliness (N = 82)	1.33	.630
To overcome the frustration of day to day living (N = 82)	1.29	.598
To escape an unhappy relationship (N = 82)	1.12	.455
<i>Cronbach's Alpha: .862</i>		
Family Togetherness Items	7.40	1.752
To escape an unhappy relationship (N = 83)	1.87	1.009
To share a common interest with my spouse or friend (N = 82)	1.15	.389
To get ready for changes in my family (N = 82)	1.11	.385
To keep up with others in my family (N = 82)	1.10	.404
To help me talk with my children (N = 81)	1.10	.300
To keep up with my children (N = 82)	1.09	.391
<i>Cronbach's Alpha: .628</i>		

**Note: N refers to the number of participants who responded to that particular item*

Constraints

For this study, constraint is defined as: any factor interfering with the pursuit of leisure (McGuire et. al, 2013). Constraints questions were created from a 2012 presentation on former members of OLLI at UNC Asheville. Participants were instructed to consider whether any of the listed factors had hindered their participation in OLLI. For this section there were only three options for responses which were: *played no role* (1), *played some role* (2), and *major reason* (3). All constraints averaged less than a 2. The constraint that had the most major reason responses was the *not enough courses of interest*; this statement had an average rating of 1.89. The lowest average rating was 1.03 for the item *not enough weekend courses*.

T-tests were performed looking at the constraints variables to compare members and former members. The groups were only statistically significantly different on two variables. These variables were *cost of membership* and *sense of community*. For members *cost of membership* had a mean of 1.46 and for former members this item had had an average of 2 suggesting that former members found cost to be more constraining than current members. For *sense of community* the mean for members was 1.13 and former members had an average of 1. However, with both means being extremely close to or at the level of *played no role*, it seems likely that this difference is of little practical significance. Because literature suggests that men and women face different constraints to leisure, T-tests were also performed for differences between men and women but there were no constraints variables that were statistically significant. The table below lists the constraint items, means, and standard deviation for each constraint item.

Table 5: Constraints

Highest Ranked Constraint	Mean	Standard Deviation
Not enough courses of interest (N = 80)	1.89	.795
Cost of courses (N = 82)	1.56	.739
Found other Interests (N = 79)	1.52	.677
Quality of courses fell below expectations (N = 80)	1.41	.610
Too far to drive (N = 80)	1.40	.648
Membership cost (N = 82)	1.39	.604
Couldn't get into Courses (N = 79)	1.28	.619
Didn't find 'sense of community' (N = 78)	1.26	.545
Same courses were repeated (N = 79)	1.22	.523
Wanted a break (N = 78)	1.14	.350
Difficulties with registration (N = 78)	1.14	.350
Transportation issues (N = 80)	1.13	.402
Health reasons (N = 79)	1.11	.392
Parking problems (N = 80)	1.09	.326
Not enough evening courses (N = 78)	1.04	.194
Not enough weekend courses (N = 79)	1.03	.158

**Note: N refers to the number of participants who responded to that particular item*

Data Summary

There were a total of 92 participants who participated in the survey, yet not every single participant completely filled out the survey. Respondents reported heavy influence for certain triggers and motivations, yet participants responded that most constraints played no role in their participation in OLLI. The most commonly reported triggers and motivations tended to be intellectual in nature. The two highest rating average triggers were: *to satisfy my curiosity in a certain topic* and *to satisfy my interest about a certain topic*. The three highest rating average motivations were: *to satisfy an enquiring mind*, *to expand my mind*, and *to learn just for the joy of learning*. All of the constraints had an average rating of below a 2 which means constraints played little role in limiting their participation in OLLI. However, the constraints most commonly reported as a major reason for reduced participation or for not renewing membership were related to the

variety or price of course and they were: *not enough courses of interest and cost of courses.*

CHAPTER V

DISCUSSION

The purpose of this study was to investigate the triggers, motivations, and constraints of Osher Lifelong Learning Institute members. Research questions that guided this study were: What factors trigger people to join OLLI? What factors motivate people to continue participation in OLLI? And, what constraints do people face to participation in OLLI?

The results of this study provide some insight into the participation of OLLI members and former members that can be of use for improving services and experiences. For Clemson OLLI to sustain and increase membership numbers, it is useful to know more about the members themselves (e.g. demographics, education, involvement in OLLI), what triggers them to join, what motivates them to participate, and what constraints they face. This study also contributes to literature on leisure innovation, learning as leisure, and leisure among older adults. The significance of this research is to be able to apply theory to practice. This was accomplished by putting together the best team possible of leisure researchers, older adult specialists, and OLLI practitioners and members.

Membership

Demographic information was similar to that of past research in that LLI participants were primarily female, married, and educational attainments are relatively high (Kim & Merriam, 2004; Lamb & Brady, 2007). Especially in the question inquiring about education, it is important to note that 100% of the respondents had at least some college experience. To increase diversity among the membership, OLLI might want to recruit members who are not as highly educated, for example by creating flyers for a

general public arena like bus stops, super markets, and gas stations which emphasize that people of all educational backgrounds are welcome. Furthermore, older adults who have not participated in much formal education may be intimidated by or uninterested in formal, traditional types of education. OLLI might consider emphasizing events that are less formal (e.g., social activities) and course topics that are less traditional (e.g., cooking, photography).

Results suggested that levels of perceived engagement could be improved among current members as only 12% identified as being *very engaged*. To increase engagement for current members OLLI can try to more closely match the expectations of members. There was a wide range of expectations expressed by the respondents in the survey. Some were course related such as expecting a “variety of courses,” “excellent interesting classes [and] activities,” “interesting courses, low cost, [and] relaxed environment.” Another expectation was fulfilling intellectual needs such as “to learn new things in retirement,” “...[to] enhance knowledge in a variety of subjects...” and “to learn something new of interest to me.” Other expectations were socially related like “meet new people,” “[meet] interesting people,” and “that it will bring together people with common interests to learn and share on a variety of subjects.” In order to do so, OLLI needs to communicate regularly with members to find out what types of classes they consider interesting and to see if their efforts to meet expectations are effective.

Triggers

Triggers can be situational or unexpected causes for adding a new leisure activity (Nimrod & Kleiber, 2007). This differs from a motivation in which an individual is moved to do something; energized and activated towards an end (McGuire, et. al, 2013)

and/or a need, reason, or satisfaction that stimulates involvement in a leisure activity (Chen & Pang, 2012). According to Nimrod and Kleiber (2007), the key distinction between triggers and motivations is that a trigger is simply a factor that causes an older adult to try a new activity, while a motivation can be the “expectations for benefits that would result from the new activity,” (p. 9). In regard to leisure innovation, Nimrod and Kleiber (2007) found that internal and external triggers were associated with intrinsic motivations respectively and instrumental triggers were both intrinsically and extrinsically motivated.

Although these variables represent different constructs, in this study, the data showed that the highest rated items for triggers and motivations were similar. The highest rated items for triggers were internal, specifically intellectual in nature (*to satisfy my curiosity in a certain topic* and *to satisfy my interest about a certain topic*). Similarly, the motivation subscale of cognitive interest was rated the highest (e.g. *to learn just for the joy of learning* and *to expand my mind*) among participants in the sample. Influential triggers and motivations may have been similar because of the type of leisure activity that was being pursued; however, the results suggest that perhaps, the literature into innovation theory has not refined the conceptualization of triggers enough to distinguish between how a person became aware of a leisure opportunity and the factor that spurred them to try it. Furthermore, based on the current findings, it is possible that for an activity such as learning as leisure, triggers may not be distinguishable from motivations as people seek out opportunities due to existing motivations.

The information about triggers that were not highly ranked may provide some valuable insights. The item *because of increased income* ($M = 1.19$) may have been

scored low because 79 out of the 82 respondents are retired and do not have an income from their career or there has not been an increase in their other sources of income. Furthermore, it is possible that these people did not experience an increase in income in their retirement years (as some people might) because they already had a high income during their working years. OLLI may consider reaching out to lower income groups by offering more free or low cost activities. Another low scoring item, *to improve my health* ($M = 1.63$) could have been found because the respondents are already in overall good health or because they look for other resources to improve their health. These low scoring items also suggest that triggers might be activity-specific. For example, health improvement has been identified as a trigger to physically active leisure (Liechty et al., 2012), however, for a program such as OLLI, it may not be relevant

OLLI is an organization in which learning as leisure occurs, therefore it made sense that the two highest rated triggers were internal; Nimrod & Hutchinson (2010) stated that these triggers tended to be activities that were creative or intellectual. The external triggers result from a current demand, social circumstance, or even coincidence (Nimrod & Kleiber, 2007). Nimrod and Kleiber's study found that most of the triggers to try a new leisure activity were external (2007), therefore it followed suit that the external triggers were highly ranked, right beneath the internal triggers. OLLI can use the information learned from triggers to make their promotion efforts more effective. OLLI could utilize external triggers by mentioning in advertisements that OLLI is great for recent retirees and people with free time. Internal triggers could be applied by emphasizing that OLLI is an opportunity to learn something new or try a new interest. Listing examples to emphasize the variety of courses could spark both external (i.e.

listing the available courses) and internal (i.e. description of intellectually stimulating courses) triggers.

OLLI can utilize insights from the ranking of triggers and the comments in the survey on how the current members learned about OLLI to attract new members. Members state that they discovered OLLI from a “flyer,” “newspaper,” and “bulletin in the mail.” These comments indicate that advertisements may make an impact on enrollment. Another way participants found out about OLLI was from other people such as “[a] friend who is a member,” “word of mouth” and “Newcomers group.” People also found out about OLLI through Clemson University whether they, “worked at Clemson University,” were an “emeritus professor,” or through “CU announcements.” These provided more specific examples of the types of factors that triggered people to join OLLI.

Motivations

Nimrod and Kleiber (2007) suggested that despite the distinction, triggers do in fact reflect a part of a participant’s motivation. Findings suggested that similarly for triggers and motivations, participants ranked intellectual items most highly. These related results both support the idea that individuals are participating in this particular type of leisure primarily for the joy of learning. Recent OLLI studies have been focusing on the social aspect of OLLI (Brady, Cardale & Neidy, 2013), yet the results of this study suggest that it was internal (*to satisfy my interest about a certain* and *to satisfy my curiosity in a certain topic*) factors that triggered participants to join and cognitive interest that motivated the participants to come back. Kim and Merriam’s (2004) study, found that cognitive interest was the most influential factor in participation and the

results of this current study support this finding. The most highly ranked motivations were cognitive interests (e.g. *to satisfy an enquiring mind, to expand my mind, and to learn just for the joy of learning*). Findings were similar to previous research in that later-life adults were not very motivated by social stimulation (Lorek Dattilo et al., 2012). Kim and Merriam (2010) used the EPS in motivations for learning among older adult in a learning in retirement institute and found that the subscale family togetherness had the lowest alpha ($\alpha = .68$). This study had similar findings in that it was also the lowest scoring subscale with the lowest overall mean of 7.40 and an alpha of .628. This could be because most of the respondents are transplants and do not have family in the area, therefore their leisure activities are not dictated by the preferences of other family members.

OLLI can apply these results to keep members motivated by keeping the courses fresh, appealing and relevant through regular review of what courses are most popular. They can keep the courses fresh by researching ideas for course topics and seeing what works for other OLLIs. When determining the course offerings, OLLI needs to create a balance of courses that are brand new and old favorites to make courses appealing to current and potential members. To make a course relevant, OLLI staff and board members can research what kind of courses the population wants, minimize a wait list, and find a quality instructor for the course. Finally, OLLI can highlight the joy of learning in their promotional materials to continue to encourage learning as leisure to be intrinsically motivated (Guinn, 1999).

As previously stated, OLLI in this context is a type of formal leisure. Women reported higher cognitive interest motivation in comparison to men. This finding is

consistent with previous literature in that women scored higher relative to men on the cognitive interest factor (Kim & Merriam, 2004). This suggests that women are more interested in creative and intellectual leisure activities than men. Research suggests that older women are engaged in more types of leisure activities than men (Janke, Davey & Kleiber, 2006). On the other hand older men are more often involved in outdoor leisure (Janke, Davey & Kleiber, 2006) or somehow involved in sports through coaching, playing, or spectating (Liechty & Genoe, 2013). In order to recruit more men, OLLI might consider offering more outdoor and active courses such as sports, hiking, or gardening.

Constraints

As for constraints, little research has looked at constraints specifically for LLI participation. Although the constraints items in this study were tailored for OLLI, there were elements of previously classified leisure constraints from Kleiber and colleagues' (2008) study such as *found other interests* (intrapersonal) and *transportation issues* (structural). Interpersonal constraints were exhibited by a former member when the respondent stated that the reason for not renewing membership was due to "husband illness." Another constraint that is discussed for older adults for generally any leisure activity (Liechty & Genoe, 2013) and was an item in the survey was *health reasons*.

It did not seem to matter how specific or general the constraints were because the results suggested that these leisure learners may not experience constraints enough to help or hinder their participation in OLLI. In fact, participants barely listed constraints at all which might suggest that this variable may not be heavily connected to participation. If someone wants to participate in a particular leisure activity, he or she will find a way to

do it. When comparing members and former members, there was little difference in regard to constraints. The only items in which the groups differed were: *cost of membership* and *sense of community*. Cost was reported as a more significant constraint for non-members. To remedy this constraint OLLI can perhaps offer cost cutting promotions to attract new and former members can offer various prices for different courses to allow more opportunities for low-income members. Creating more social gatherings can accommodate for the lack of sense of community constraint current members perceive. There has been literature that suggested that men and women experience different constraints due to sex-role norms and values (Crawford, Godbey & Shen, 2010; Shaw & Henderson, 2005), but constraint differences by gender seemed to not have occurred in this study. This could be due to the fact that not only was there a small representation of males in the sample, but that the items did not cover the whole gamut of gender-related leisure constraints.

The finding that participants did not perceive high levels of constraints has implications for our conceptualization of leisure constraints. Some scholars have critiqued the concept of leisure constraints, suggesting that it does not take into account the complexity of peoples' lives and that researchers might perceive constraints differently than participants (Samdahl & Jekubovich, 1997; Samdahl, Hutchinson, & Jacobson, 1999). Among older men, Liechty and Genoe (2013) found that participants themselves resisted the idea of constraints saying that their leisure choices simply reflected their priorities rather than being determined by constraints. The current findings support this critique as participants reported generally low perceived constraints.

Since the results of the constraints did not have a specific pull of being positive or negative, OLLI can attempt to build on the idea that constraints can be enabling by considering some of ways identified by Kleiber and colleagues' (2008) by which constraints can be enabling. The first type, resilience and deepened commitment, can be facilitated by OLLI offering courses that last longer than a month. The “drop-in” courses suffice for quick introductions, but if OLLI offers courses that are more extensive in time and commitment, members may feel encouraged to invest in one quality activity. This idea can also be applied to the second type of enabling constraints, attention to other existing goals. If, for example, OLLI offers a course on gardening that lasts the whole year to plan, prepare, and implement gardening, it could draw in the members who already want to garden and allow them the support to achieve their specific gardening goal. Another type of enabling constraint that Kleiber and colleagues (2008) mentions that is similar to leisure innovation theory is the discovery of previous unattended capacities. OLLI can offer “throwback” courses in which it would spotlight activities from a certain eras like listening to stories on the radio, dances from different decades, or going to a drive in movie.

Implications for Leisure Innovation Theory

In one of the first studies using innovation theory, Nimrod and Kleiber (2007) sampled participants in a lifelong learning institute. The authors stated, “Because of the general good health and orientation toward learning and engagement in members of the [Learning in Retirement] group, we felt that it offered the best context for studying the conditions and consequences for various patterns of innovation,” (p. 6). The results of this study were consistent with Nimrod and Kleiber’s (2007) study in that Clemson OLLI

members were presumably healthy because they were not constrained by health reasons and because the majority of the respondents had previous learning as leisure experience, one can assume that they are oriented towards learning. More innovation theory studies should be done in OLLI because not only does it provide an environment to participate in a new leisure activity, but it attracts a certain personality. Nimrod and Kleiber (2007) suggest that differences in personality may have an influence on leisure innovation. If OLLI could diversify its population by recruiting a variety of people from the previous suggestions, researchers can find out if personality does play a role in leisure innovation.

This study inquired why respondents started participating in OLLI, also known as triggers, a component of Leisure Innovation Theory. One of the main reasons Nimrod (2008) wanted to conduct a study about innovation theory, older adults, and life satisfaction was to battle the mindset that people slow down with age and do not participate in leisure activities anymore (or participate in reduced levels) and substitute them with less challenging alternatives. This study supports this idea that if older adults are joining OLLI later in life and are satisfied with their participation, retirement is not just a time to slow down, but an opportunity to try new things, and to learn new things, if they can and want to. In the open ended question of “what expectations did you have of OLLI,” the majority of responses are related to something new whether it’s learning to do something, exploring a new interest, or meeting new people.

Another finding to consider is that the majority of participants reported that they had participated in learning as leisure in the past. This suggests that learning as leisure is more often the type of innovation in which individuals participate in a familiar activity, although it is being performed in OLLI, a setting that is a new and different than previous

experiences. Innovation Theory posits that adopting a new leisure activity later in life can benefit older adults by either helping them to re-invent or preserve their sense of self (Nimrod & Kleiber, 2007). For participants in this sample, joining OLLI may have been an opportunity to preserve their sense of self as the majority were highly educated and reported prior engagement in learning as leisure. This interpretation is limited, however, because no quantitative measures of self-preservation vs. self-reinvention exist. Future research should explore the potential of learning as leisure to provide a setting for self-preservation innovation.

Limitations and Directions for Future Research

This study was conducted among one specific OLLI organization and therefore, the results are not generalizable to a larger population of lifelong learners. The sample size was smaller than the goal number. One could speculate the response rate was due to OLLI's overall lack of engagement or due to the survey being part of a newsletter rather than a stand-alone email. However, attending a few OLLI classes to talk about my study and ask members personally to respond probably created a larger sample.

Furthermore, there are no validated scales that exist related to triggers or innovation theory, which limit the usefulness of results. Another comment about the respondents is that the majority of the sample had graduate school degrees; therefore it may not have been representative of OLLI members or older adult learners who have less formal education. One has to think, do the lesser educated people in the area just not want to participate in learning as leisure, are they intimidated by OLLI and its members, or do they not feel welcome in this environment? Inquiring about the participants'

previous work would and leisure have given a better idea about how “new” OLLI and learning as leisure was in their repertoire.

Although this study provided insight into triggers and motivations, the results may have related to the type of leisure activity that was being pursued. Since this activity is learning as leisure and there were intellectual items in both triggers and motivations people may have been drawn to pick those responses. The similarity between triggers and motivations may also be related to methodological issues. First, although the instructions in the survey distinguished between triggers and motivations for participants, it is possible that with such closely related constructs, participants themselves did not perceive a difference. Furthermore, we may have learned more about triggers if they had more possible responses or if the options were similar to the responses that were described in the open ended question of “how did you hear about OLLI.” For instance, if there were external triggers like, *because a friend told me about it* or *I learned about it from an advertisement*, the distinction between triggers and motivations may have been clearer.

Although it was not the primary focus of this study, having more former members in the sample would have aided in a better understanding of comparing triggers, motivations, and constraints with current members. The sample included only 12 former members and these participants may not be representative of all former OLLI-Clemson former members, which may account for the lack of statistically significant differences between current and former members. In fact, half of the former members indicated that they intended to renew their membership suggesting that they did not leave for reasons related to dissatisfaction with OLLI. I wanted to investigate the original reason why the

respondents did not renew their membership for the five former members who planned not to renew their membership. Their responses were OLLI related such as "...very cliquish and not welcoming of new members," "I didn't find any classes I wanted to take at a reasonable price," "classes were not what I expected," and "lost interest in what was being offered..." Future research should more heavily explore former members such as these and what OLLI can do to reduce these kinds of issues related to course quality and dynamic of new members versus long-standing members.

Results of this study showed that over three fourths of the sample was women. Future research should continue to explore the differences between men and women in OLLI. Previous research as suggested that men and women have different leisure preferences (Janke, Davey & Kleiber, 2006). For instance, men engage in more high-intensity physical activity (Agahi & Parker, 2008) and women particularly participate in more cognitive related leisure (Kim & Merriam, 2004). Future research can focus on what elements (e.g. social factors and types of classes offered) of OLLI specifically draw more women in than men and the different needs of men and women (e.g. preferred course offerings). Learning these differences can influence the marketing of OLLI and help them to diversify their members.

Future research could expand other regions of the United States and ultimately all OLLIs nationwide as a whole. Research can also be extended to learning as leisure among older adults with lower levels of formal education. Another suggestion for future research would be comparing men and women's preferences in learning as leisure. Finally, this study only looked at current or former members. Future research should explore older adults who choose not to join LLIs and the possible constraints that may

discourage them from joining. Finally, future research into leisure and aging would benefit from increased refinement of Leisure Innovation Theory. Nimrod and Kleiber, (2007) suggested that constraints could have an influence on leisure innovation. Now that this study has identified some constraints, future research can correlate the leisure innovation elements and constraints.

This study explored triggers to learning as leisure, however, future research could learn more about triggers through scale development to quantify certain aspects of Leisure Innovation Theory and refine understanding of triggers. This scale development can be applied to other leisure activities that people are engaged in.

Conclusion

This study provides useful information to Clemson's OLLI when trying to attract new members and keep them around. The take home message for this organization is that people are there to take classes and learn new things. Future efforts for OLLI to attract and retain members can focus on creating and implementing a diverse and rich course selection with quality instructors. The results in this study showed that most people learned about OLLI through friends and advertisements (newspapers, newcomer groups, university affiliation, etc.) If there was an incentive for members to bring friends and family to an OLLI event, perhaps that could lead to new enrollments.

Learning as leisure provides tremendous opportunities and potential for older adults. Every OLLI should take the time to understand their members to create an exceptional environment and to nurture and facilitate quality learning as leisure. Referring back to one of McGuire's (2000) comments on older adults and leisure, this study is an example that connecting research and practice is attainable. Perhaps this

research can inspire more universities who are affiliated with an OLLI to produce research for this organization and work with the OLLI members and staff. By partnering the research with the organization, more studies can be created for application.

APPENDICES

Appendix A

E-Newsletter/Flyer

Greetings! My name is Sara Baral and I am in the master's program at Clemson University studying Parks, Recreation, and Tourism Management. I am conducting a study on participation of OLLI members and I need your help! You are receiving this email because you are on the OLLI weekly e-newsletter list. Whether you are a current member, former member, or "friend" of OLLI, I would like you to participate in this survey to find out why you started participating in OLLI and why you keep coming back or why you left.

The survey is mostly multiple choice or Likert scale questions and should not take longer than 15 minutes. Please only take this survey once. To ensure anonymity I will not have access to your names or email addresses. The results will be used to inform my master's thesis data collection. Your participation will be greatly appreciated! Not only will it help me graduate from Clemson University, but it can also enhance your experience at OLLI. Click the link below to access the survey. If you have any questions you may email me at sbaral@g.clemson.edu. Thank you for your consideration!

Please click the link or copy and paste the URL to your web browser to access the survey.

Learning as Leisure: OLLI Survey

<https://www.surveymonkey.com/s/learningasleisureollisurvey>

Appendix B

Participation in OLLI

1. Are you currently a member in OLLI?
Yes, I am currently a member. (If selected, question skips to “do you plan to renew your membership?”)
No, I used to be a member.
No, I have never been a member. (If selected, question skips to end of survey)
2. When was the last year you were a member?
3. What reasons led you to not renew your membership?
4. Do you plan to renew your membership?
Yes
No
5. How long have you been/were you a member?
Less than one year
1 – 2 years
3 – 4 years
More than 4
6. How engaged do you think you are/were in OLLI?
Not Engaged
Somewhat Engaged
Engaged
Very Engaged
7. Do/Did you volunteer with OLLI?
Yes
No (If selected, question skips to have you ever participated in any learning as leisure activities...)
8. What volunteer roles do/did you fulfill (you may choose more than one answer)
Instructor
Governance
Committee
Other (please specify)
9. Have you participated in any learning as leisure activities prior to OLLI (e.g. educational classes, teaching yourself how to do something/how something works, etc.)
Yes
No

10. How satisfied are/were you with your participation in OLLI?

Very Unsatisfied

Somewhat Unsatisfied

Somewhat Satisfied

Very Satisfied

Appendix C

Trigger Questions

People might join a new group or start a new leisure activity for various reasons. In this section, please indicate to what degree each of the following triggered you to join OLLI.

	No Influence	Little Influence	Moderate Influence	Heavy Influence
To satisfy my interest about a certain topic	1	2	3	4
Because I've been wanting to try OLLI for a long time	1	2	3	4
Because I had the freedom to join	1	2	3	4
To make new friends	1	2	3	4
To satisfy my curiosity in a certain topic	1	2	3	4
Because I had the time	1	2	3	4
Because I heard about it	1	2	3	4
Because of the activities available	1	2	3	4
To improve my health	1	2	3	4
Because of increased income	1	2	3	4
To improve skills	1	2	3	4
To keep me occupied	1	2	3	4

Appendix D

Motivations Questions

After starting a new activity, there are reasons that motivate a person to continue to participate in OLLI. Indicate the extent to which each of the reasons listed below influence you to stay involved with OLLI.

If you are no longer a member please think about what influenced you to stay involved with OLLI while you were a member.

	No Influence	Little Influence	Moderate Influence	Heavy Influence
To acquire general knowledge	1	2	3	4
To learn just for the joy of learning	1	2	3	4
To expand my mind	1	2	3	4
To satisfy an enquiring mind	1	2	3	4
To seek knowledge for its own sake	1	2	3	4
To get something meaningful out of life	1	2	3	4
To meet different people	1	2	3	4
To become acquainted with friendly people	1	2	3	4
To have a good time with friends	1	2	3	4
To meet new people	1	2	3	4
To make friends	1	2	3	4
To make new friends	1	2	3	4
To do something rather than nothing	1	2	3	4
To get a break in the routine of home or work	1	2	3	4
To get away from loneliness	1	2	3	4
To get relief from boredom	1	2	3	4
To overcome the frustration of day to day living	1	2	3	4

To escape an unhappy relationship	1	2	3	4
To share a common interest with my spouse or friend	1	2	3	4
To get ready for changes in my family	1	2	3	4
To keep up with others in my family	1	2	3	4
To keep up with my children	1	2	3	4
To help me talk with my children	1	2	3	4
To answer questions asked by my children	1	2	3	4

Appendix E

Constraints Questions

To what extent do/did these factors limit your participation in OLLI (such as classes, special events, and social activities) or cause you to not renew your membership?

	Played No Role	Played Some Role	Major Reason
Membership cost	1	2	3
Found other interests	1	2	3
Didn't find 'sense of community'	1	2	3
Health reasons	1	2	3
Parking problems	1	2	3
Too far to drive	1	2	3
Transportation issues	1	2	3
Wanted a break	1	2	3
Not enough courses of interest	1	2	3
Couldn't get into courses	1	2	3
Cost of courses	1	2	3
Difficulties with registration	1	2	3
Quality of courses fell below expectations	1	2	3
Not enough evening courses	1	2	3
Not enough weekend courses	1	2	3
Same courses were repeated	1	2	3

Appendix F

Demographic Information

1. Please write in your current age.
2. Sex:
Male
Female
3. Please write in your current zip code.
4. What is the highest level of education you have completed?
Some High School
High School Diploma
Some College
College Degree
Some Graduate School
Graduate School Diploma
5. Marital status
Married
Divorced
Widowed
Unmarried
Other (please specify)
6. Are you retired?
Yes
No
7. Do you participate in any paid work?
Yes: full time work
Yes: part time work
No

Appendix G

Information about Being in a Research Study
Clemson University

LEARNING AS LEISURE AMONG OLDER ADULTS: THE IMPACT OF MOTIVATIONS AND CONSTRAINTS ON ENGAGEMENT OF OLLI MEMBERS USING LEISURE INNOVATION THEORY

Description of the Study and Your Part in It

Toni Liechty and Sara Baral are inviting you to take part in a research study. Toni Liechty is an Associate Professor at Clemson University. Sara Baral is a student at Clemson University, running this study with the help of Toni Liechty. The purpose of this study is to inform a master's thesis data collection. The goal of the thesis is to understand why people participate in OLLI and what is sustaining their involvement. In addition to gathering information as a requirement for a master's degree completion, the results will be shared with OLLI to improve their organization and for possible academic or professional publication or presentations,

Your part in the study will be to answer questions about motivations and constraints for participating in OLLI, how engaged you are/were in OLLI, demographic information, and your opinion and experience on OLLI in general.

It will take you approximately 10 - 15 minutes to participate in the study.

Risks and Discomforts

We do not know of any risks or discomforts to you in this research study.

Possible Benefits

Findings of this survey can be used by OLLI to tailor their organization to your needs thus improving your experience at OLLI.

Protection of Privacy and Confidentiality

We will do everything we can to protect your privacy and confidentiality. We will not tell anybody outside of the research team that you were in this study or what information we collected about you in particular.

Choosing to Be in the Study

You do not have to be in this study. You may choose not to take part and you may choose to stop taking part at any time. You will not be punished in any way if you decide not to be in the study or to stop taking part in the study.

Contact Information

If you have any questions or concerns about this study or if any problems arise, please contact Toni Liechty at Clemson University at (864) 656-1244; tliecht@clemson.edu.

If you have any questions or concerns about your rights in this research study, please contact the Clemson University Office of Research Compliance (ORC) at 864-656-6460 or irb@clemson.edu. If you are outside of the Upstate South Carolina area, please use the ORC's toll-free number, 866-297-3071.

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