

# What Will Baby Boomers Want From Educational Travel?

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## Executive Summary

1. The oldest of the children of the first generation of Elderhostelers — the Baby Boomers — are entering their late 50s and early 60s.
2. Every generation as it ages increasingly pursues “self-actualization” — an inner journey to discover one’s true self, and become that person — and “educational travel” is a highly relevant tool for achieving self-actualization.
3. While the pursuit of self-actualization is a constant, each generation has its own style, and understanding that style is a key to developing products and services that appeal to a particular generation.
4. The nature of work in the industrialized world has changed and, rather than being physically grinding as it was a century ago, work can be, and often is, mentally stimulating and socially gratifying.
5. Concerns about the integrity of pensions and the Social Security system, coupled with the positive benefits of work noted above, have many Baby Boomers planning to postpone retirement beyond the age their parents typically retired.
6. The first Generation of Elderhostelers (the Greatest or G.I. Generation), formed by experiences ranging from the birth of Scouting and the Great Depression to World War II and the explosion of the suburbs and affordable housing, is comfortable with authority and uncommonly “group” oriented.
7. Baby Boomers, by contrast, are independent, idealistic and anti-authoritarian. They’re also media-saturated, pummeled by 3,000 advertising messages a day.
8. America’s international coming of age, the intense and searing experience of World War II at an impressionable age, decades of a strong dollar and the advent of affordable international air travel, fueled in the Greatest Generation a mass interest in international travel in the second half of the 20<sup>th</sup> century.
9. The idealism and introspection of the Baby Boomers point to the continued relevance of the “outward journey” to the next generation of older Americans, albeit for somewhat different motivations.
10. The prospect of a longer life, and the prospect of the mind perhaps deteriorating before the body, gives added appeal to activities that stimulate the mind and keep dementia at bay.
11. For the reasons noted, Baby Boomers will particularly look for the following features in educational travel: a) smaller groups; b) hands-on, experiential learning, and behind-the-scenes access; c) accommodations and meals “on theme” where feasible; d) plenty of free time — including many meals “on your own” — built into the schedule; e) active programs, and f) shorter programs with accessible pricing.

### Introduction: What Will Baby Boomers Want From Educational Travel?

Launched in 1975 as the first widely available educational travel service for older adults, Elderhostel grew quickly because it answered the needs of an educated, prosperous, healthy and eager new breed of retiree. These pioneers, born early in the 20th century and brought together as a generation by the Great Depression and World War II, had attended college in record numbers and benefited from the creation of Medicare in 1965 and the rapid increase in Social Security payouts in the 1970s. They were educated, fit, financially secure, and not ready to retire to the front-porch rocker or slip quietly into senescence. Elderhostel offered then, and continues to offer now, intellectual stimulation, new experiences, and a warm social environment to people ranging in age from their late 50s to 90 and older, with the core of its participants between the ages of 65 and 80.

Now the oldest children of the first generation of Elderhostelers are entering their late 50s and early 60s. This generation, typically called Baby Boomers and delineated as

those born in the period 1946 to 1964 (though others have made a strong case for using 1943 to 1960) has key similarities but important differences from the generation of its parents (variously called the Greatest or G.I. Generation).

This paper will explore the differences between the G.I. Generation and the Baby Boomers, while answering the following questions: 1) Will Baby Boomers want educational travel? 2) If so, what if anything has to change about the way educational travel is packaged and communicated to satisfy them?

### Cohort vs. Generation

Those who study the human life cycle divide into two camps — one believing each generation has its own unique personality, its own style and stamp, and another, arguing that the notion of a “generation” is an artificial construct, believing human motivations are rooted in biology and constant across human history.

The truth is that both viewpoints are valid and important. The way the body and mind of each person changes through his or her lifetime — no different fundamentally now than it was 1,000 years ago — establishes a frame of human possibility. But individual experience, often quite similar to the experience of one’s peers — one’s “generation” — also is important.

### The Pull of Self-Actualization

The psychologist Abraham Maslow famously posited a “hierarchy of needs” to describe the building blocks of human development, each layer of blocks a foundation and a prerequisite for the next. Humans first seek to satisfy their “primary needs,” among

them, safety and security. Only when basic physiological and psychological needs are satisfied (for example, those satisfied by food and shelter) do humans seek to satisfy their “growth needs,” such as love, belonging and esteem.

At the top of Maslow’s hierarchy is what he calls “self-actualization,” a state not typically achieved, nor especially aspired to, until one is 50 or even 60 years old. Self-actualization involves discarding the masks we wear earlier in life when esteem, success, sex and other social urges are paramount. A self-actualizing person is on an inner journey to discover his or her true self, and to become that person. In this phase of life we crave experience that’s authentic more than we crave material possessions or the approbation of others. Self-actualization is defined as “the ongoing actualization of potentials, capacities and talents, as fulfillment of mission ... as a fuller knowledge of, and acceptance of, the person’s own intrinsic nature, as an unceasing trend toward unity, integration or synergy within the person.”<sup>1</sup>

Maslow offered his theory of human development as one fixed across human history, while noting that many people — because their “lower level” needs are unmet — never have the luxury and pleasure of experiencing self-actualization. Now there’s research that may support the notion that Maslow’s theory may be rooted in biology. As it ages and changes biologically, our brain naturally becomes a more fertile field for the “peak experiences” Maslow cites as characteristic of the self-actualization phase. Recent studies have shown that older people who perform well on memory and other mental tasks that younger people perform “asymmetrically” — that is, solely by using one or the other lobe of the pre-frontal cortex — do so by relying simultaneously on both lobes (the

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<sup>1</sup> *Toward a Psychology of Being*, A. Maslow, p. 25

so-called “compensation” hypothesis).<sup>2</sup> As we age and more fully utilize both sides of our brains, the experiences Maslow equates with self-actualization — among them, wholeness, perfection, completion, aliveness, richness, beauty, and playfulness — become not only more likely (because self-actualization is a state not typically attained until one’s sixth or seventh decade), but more biologically possible (because of the way our brains change as we age). “Compensating” to make up for deterioration holds a hidden benefit, that is, a fuller engagement of both sides of the brain, laying the mind open to a richer array of sensual stimulation. “How is it possible,” asks author David Wolfe, “that as a person gets closer to his or her last dawn, life can be more beautiful and satisfying than ever, and concerns about future dire events seem to abate? The answer may involve the progressive migration of mental activity in the second half of life toward the right brain. Unlike the analytical left brain, the emotional right brain cannot quantify anything, including time itself. Regarding the present-centeredness that becomes more frequent in a state of self-actualization, psychologist Robert Ornstein suggests that we ‘regard these ... moments as shifts towards a right brain dominance.’ ”<sup>3</sup>

### Self-Actualization and Educational Travel: What’s the Connection?

Is educational travel something that’s likely to stimulate Maslow-ian “peak experiences?” We intuitively feel that it is, and the artists and dreamers among us have long said so. Author Lawrence Durrell wrote “[t]ravel can be one of the most rewarding forms of introspection,” acknowledging that a voyage out into the world often is very much an inward journey as well. Pat Conroy wrote: “Once you have traveled, the voyage

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<sup>2</sup> “Aging Gracefully: Compensatory Brain Activity in High-Performing Older Adults,” Cabeza et al, April, 2002

never ends, but is played out over and over again in the quietest chambers, that the mind can never break off from the journey.” Dr. Maslow used these phrases to describe what one feels, or observes in someone, having a peak experience: “[H]e is more able to fuse with the world ... the appreciator *becomes* the music or the painting ... .” Durrell, Conroy and Maslow all are describing moments when one’s innermost self is blissfully joined with the world outside; we’re left with little doubt that educational travel at its best is a peak experience, a step along the path toward self-actualization. And the desire for self-actualization is placed by psychology — and the mechanics of the brain itself — in the latter part of life.

#### Generations are Real; Their Experiences are Different and Meaningful

David Wolfe, in his book *Ageless Marketing*, writes that “[a]ging Boomers’ differences from previous generations are a matter of style rather than of substance. They might differ in how they meet their core needs, but not in what their core needs are. Core needs, which are at the heart of what defines us as human beings, do not change from one generation to the next.”<sup>4</sup> Self-actualization is a deep human urge, and travel can provide the peak experiences sought by those in the self-actualization process. But issues of “generational style” also are important and are the keys to understanding the characteristics Baby Boomers will look for in educational travel.

Several factors come into play, including the changing nature of work and how that’s changing the way people look at retirement, the uncertain economic future of the

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<sup>3</sup> *Ageless Marketing*, p. 322, David Wolfe, 2003

<sup>4</sup> *Ageless Marketing*, p. 51. David Wolfe, 2003



Baby Boomers, and how the common cultural experiences of the Baby Boomers compare to those of previous generations.

### The Nature of Work — and Retirement — Has Changed

Change often occurs so slowly and incrementally that the cumulative effect of numerous small changes is hard to see until you step back for a perspective across history.

Consider for a moment what it meant to work — and to “retire” — in the late 19<sup>th</sup> century. In the United States and the rest of the industrialized world, work could quite literally kill you, and often did, if not instantly in an accident, then certainly over time in a slow and painful wearing-down process. Work was physical and demanding, conditions were dangerous, regulations were few. Miners died in floods and explosions, or dwindled with wasting diseases of the lungs. “In the factories that sprang up after the Civil War, chemicals, dusts, dangerous machines, and a confusing jumble of belts, pulleys and gears confronted inexperienced, often very young workers. The reports of State labor bureaus in the 1870s and 1880s were full of tragedies that too often struck the unwary or the unlucky.”<sup>5</sup> For women in the sewing trades, eyesight and dexterity decayed with age. One Dutch woman, desperately looking for a place to live, “wrote to the trustees of the almshouse that she could not perform her job any longer because: ‘My eyes can not see the delicate needlework anymore.’”<sup>6</sup>

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<sup>5</sup> “The Job Safety Law of 1970: Its Passage Was Perilous,” Judson MacLaury, *Monthly Labor Review*, March 1981

<sup>6</sup> “A Cracked Mirror: Images and Self-images of Elderly Men and Women in the Netherlands in the Nineteenth Century,” Monique Stavenuiter, *Journal of Social History*, Winter 1995

As work was different 100 years ago, so was retirement. “In the late 19th century, many retirements involved a few years of dependence on children at the end of life.”<sup>7</sup> An active, stimulating retirement was the exception rather than the rule. Compare the experience of the almshouse supplicant to her educated Dutch contemporary, Dr. Allebe. The doctor “retired from his practice in Amsterdam in 1874, after a period of 38 years. Still, after his retirement he continued working for many committees and advisory boards. As a liberal and a hygienist, he was highly interested in public health and published on such matters as child care, cholera, public housing and gymnastics. In November 1884, when he was 74 years old, he wrote in his diary he would like to continue working ‘as long as possible.’ ”<sup>8</sup> The doctor’s experience sounds modern to our ears (perhaps he was self-actualizing!), while the experience of the frail seamstress seems, as indeed it is, like something from an era in the distant past.

Now, 100 years later, the proposition has been totally reversed. In the industrialized world knowledge and service work dominate the economy in the way manual work did a century ago. Not only is work no longer physically grinding, it’s often fun and stimulating. What’s more, as work has become more collaborative in nature, as society has become more mobile and other social networks have broken down, work can also be highly socially gratifying.

### The Economic Forecast for Retiring Baby Boomers: Partly Sunny

The AARP’s survey titled “Baby Boomers Envision Retirement,” first conducted in 1998 and updated in 2004, shows a distinct change in attitudes about retirement.

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<sup>7</sup> “Economic History of Retirement in the United States,” Joanna Short, Augustana College

In 2004, “48% of Boomers define retirement as a time to indulge themselves, down seven points since 1998.”<sup>9</sup> “Leading edge Boomers, those age 53 to 57, who are closest to retirement age, are most likely to have made adjustments in their definition of retirement since 1998. Down notably since the previous study are the proportions of Boomers this age who view retirement as a time to pursue hobbies and interests (67%, down eight points), a time of leisure (54%, down nine points), and a time to indulge themselves (41%, down 10 points).<sup>10</sup>

Given the collapse of the Internet stock market bubble, the subsequent recession, the terrorist attacks of Sept. 11, 2001, underfunded or bankrupt pension plans, and growing concern about the long-term solvency of Social Security and Medicare, this is hardly surprising.

Consistent in both surveys, about four out of five Baby Boomers plan to work “in some capacity” in retirement. What’s declined is the segment of those who plan to work part-time who will do so for enjoyment’s sake rather than for the income. In 1998, 35% planned to work for enjoyment’s sake, compared to 23% who planned to work for the income. By 2004 that margin had shrunk to 30%, compared to 25%.<sup>11</sup>

Nevertheless, Baby Boomers remain surprisingly optimistic about retirement. “69% of Baby Boomers say they are very or fairly optimistic about their retirement, on par with the 70% reported in 1998 ... 46% say their retirement outlook has changed for the better in the past five years. Those with an improved outlook are most likely to attribute it to efforts to save more for retirement and improvements in their financial

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<sup>8</sup> “A Cracked Mirror: Images and Self-images of Elderly Men and Women in the Netherlands in the Nineteenth Century,” Monique Stavenuiter, *Journal of Social History*, Winter 1995

<sup>9</sup> “Baby Boomers Envision Retirement II,” p. 6, AARP, 2004

<sup>10</sup> “Baby Boomers Envision Retirement II,” p. 20, AARP, 2004

situation that result from lifestyle changes such as paying off a mortgage or having their last child move out of the house.”<sup>12</sup>

Given the changing nature of work, particularly its social benefits and the fact that at its best it’s intellectually satisfying, it isn’t surprising that overall optimism hasn’t suffered despite more Baby Boomers reporting they expect to work in retirement for the income.

Still, there’s good evidence that the still-high optimism of the Baby Boomers may temper a bit in the coming years. The sheer size of their generation, increased life expectancy and the decline in the birthrate — and the immutable laws of supply and demand — are working against the Baby Boomers. For the last 40 to 50 years, the ratio of working people to retirees has stayed relatively constant at about 4:1, and “normal” retirement age has remained relatively constant at 65. This ratio appears to be one our society is comfortable carrying, that is, there’s a basic equilibrium in effect when four workers pay taxes that support one retiree. But demographic shifts bring the ratio and the retirement age in conflict. For the ratio to remain constant, normal retirement age will have to increase to 70 by 2018 and to 73 by 2053.<sup>13</sup> Thus even leading edge Baby Boomers — those born in 1946 and now aged 58 — are likely looking at another 12 years of work. The consolation prize is that work is more enjoyable — or at minimum less distasteful — than it used to be. And “[t]he good news is that this generation will live longer and be healthy longer than any generation that preceded it — extending our working lives a few years is a small price to pay for being able to live so much longer.”<sup>14</sup>

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<sup>11</sup> “Baby Boomers Envision Retirement,” p. 24, AARP, 2004

<sup>12</sup> “Baby Boomers Envision Retirement II,” p. 5, AARP, 2004

<sup>13</sup> “Will We Retire Later and Poorer?,” Arnott and Casscells, *The Journal of Investing*, p. 30, Summer 2004

<sup>14</sup> “Will We Retire Later and Poorer?,” Arnott and Casscells, *The Journal of Investing*, p. 35, Summer 2004

### “The Greatest Generation”: Healthy, Wealthy, Wise and Group-Oriented

To understand how the common experiences of the Baby Boom generation will influence what it will want from educational travel, it's helpful to understand the common experiences of its parents' generation, and how those experiences informed its tastes in educational travel.

The Greatest Generation — also called the G.I. Generation — has been usefully defined as those Americans born in the period 1901 to 1924.<sup>15</sup> The generation's experience with The Great Depression and World War II is well known and much chronicled, but its other common experiences are important and worth mentioning.

The G.I. Generation's early youth coincided with a quantum forward leap in public health standards, thanks to the laws regulating the processing of food and drugs passed in the 20<sup>th</sup> century's first decade, also known as the Progressive Era. Education also leapt forward — “[f]or the first time ever, more teens were in class than out, making school an important socializing force.”<sup>16</sup> Indeed, “G.I.s produced by far the largest one-generation jump in educational achievement in American history. From [the preceding generation] to G.I., the average length of schooling rose from the ninth grade to the 12th, the share of 20-year-olds attending college tripled, and math and science aptitudes rose sharply.”<sup>17</sup>

Group activity has been a constant feature of the G.I. Generation experience, from the Boy Scouts (brought to the United States in 1910), Girl Scouts, and the high school experience, to The New Deal's Civilian Conservation Corps work teams and World War

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<sup>15</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 261, 1991

<sup>16</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 270, 1991

II's military units (and factory experience for "Rosy the Riveter" and thousands of other women), from the new suburbs like Levittown and the corporate workplace of the '50s, to Sun City and, beginning in 1975, Elderhostel.

In addition to unprecedented good health and education (at least in comparison to previous generations), and a strong group ethic, the G.I. Generation has been extraordinarily prosperous. "G.I. elders tower over younger adults in rates of homeownership and health-insurance coverage, and in average dollars of discretionary income and household net worth ... From 1965 to 1989 — as G.I.s have reached age 65 — federal benefits per elderly person have risen 15 times more rapidly than wages (300 percent versus less than 20 percent, in inflation-adjusted dollars). In 1989, total federal benefits averaged over \$14,000 per elderly household. Social Security and Medicare benefits have paid back most G.I.s for the entire value of their prior payroll tax contributions (including employer contributions and interest) within four years after retiring."<sup>18</sup> (Because Social Security and Medicare are not strictly investments in future retirement but instead are "transfer payments from the workers to the nonworkers,"<sup>19</sup> it's clear that one of the smartest thing the G.I. Generation did was to bear lots of children to fund those huge transfer payments!)

With this understanding of the extraordinary health and wealth of the G.I. Generation, and its deeply ingrained group ethic, it's not surprising that retirees flocked to Elderhostel when it was founded in 1975, nor is it surprising that Elderhostel has seen extraordinary growth in the subsequent decades. And Elderhostel's program structure — all-inclusive pricing, a busy schedule with little "free time" — is naturally appealing to

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<sup>17</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 267, 1991

<sup>18</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 268-9, 1991

this generation. Indeed, not surprisingly, Elderhostel program coordinators have observed that Elderhostelers exert an unobtrusive, but good-humored, pressure on one another to conform to group decisions, not to complain publicly, and to stay on schedule.

### The Baby Boomers: Independent, Idealistic and Anti-Authoritarian

While the Baby Boomers' experience with health and education has been incrementally better than that of their parents, the most significant differences between the generations are certainly their comparative civic postures and attitudes toward authority and group activity. While it's been written that "[B]oomers have had difficulty achieving consensus and mobilizing as a unit, making them far weaker than the G.I.s at getting big jobs done,"<sup>20</sup> it's more correct to say that Boomers — unlike the G.I. Generation — resisted being mobilized by their parents' generation into a unit. On the contrary, Boomers are independent, relatively anti-authoritarian, even atomized. The G.I. Generation was mobilized to fight a war; Baby Boomers mobilized to protest a war, but it was a curious kind of mobilization often as much about individual self-expression as solidarity. Where the G.I. Generation danced together in careful steps to the Big Bands, Boomers attended "rock concerts at which dateless teenagers could dance the night away all by themselves if they wanted."<sup>21</sup>

Baby Boomers have a streak of idealism with corollary desires for perfectionism and authenticity. "They developed a unique brand of perfectionism in consumption, a desire for *the best* within a very personal (and often financially austere) definition of

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<sup>19</sup> "Will We Retire Later and Poorer?," Arnott and Casscells, *The Journal of Investing*, p. 32, Summer 2004

<sup>20</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 303, 1991

<sup>21</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 308, 1991

taste. If a Boomer couldn't afford a house or family, he could at least afford the very best brand of mustard or ice cream."<sup>22</sup>

While the G.I. Generation certainly lived through a communication revolution in the form of radio — the first mass electronic media — it pales in comparison to the breakneck pace of change in media the Baby Boomers have experienced: television, color television, cable and satellite television, color newspapers and the “chunking” of news pioneered by USA Today and, of course, the digital revolution of PCs and the Internet. According to *The Economist*, “[i]t has been calculated that the average American is subjected to some 3,000 advertising messages every day.”<sup>23</sup> These messages come in a bewildering variety of colors, volumes, shapes and sizes and, given the advent of SPAM and Internet pop-ups, this estimate may be on the low side.

### Will Baby Boomers Self-Actualize With Educational Travel?

It's no mystery that the G.I. Generation was drawn to educational travel as a means of self-actualization. Aside from the deep and long-observed connection between outward and inward journeys (see above, pages 7-8), economic and political conditions were uniquely ripe for an exploding of interest in educational travel. World War II gave millions of young American men an intense and searing international experience at an impressionable age, and in a real sense that generation's coming of age coincided with America's own coming of age in, and increasing leadership of, the international scene. What's more, as airplane technology improved and the cost of international travel

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<sup>22</sup> *Generations: The History of America's Future, 1584-2069*, Strauss and Howe, p. 302, 1991

<sup>23</sup> “The harder hard sell,” *The Economist*, June 24, 2004



became relatively less expensive, buoyed by a strong dollar, the means for travel matched the underlying interest.

And what about the Baby Boomers? Why should we assume they'll continue to be interested in international travel, especially as the post 9/11 world seems so much more menacing, especially to Americans.

Their previously noted independent, anti-authoritarian streak may in fact make travel even more appealing to Baby Boomers. Fed in their youth on literary main courses like Jack Kerouac's "On the Road" and Robert Pirsig's "Zen and the Art of Motorcycle Maintenance," they've long equated self-discovery with physical journeys. Many were inspired by John F. Kennedy's exhortation to "ask what you can do for your country" and joined the Peace Corps, participated in the explosion of the "semester abroad" phenomenon in the late 1960s and 1970s, or simply dropped out for a while and backpacked the world on the cheap, armed only with "Europe on Five Dollars a Day," a "Let's Go" guide, or any of numerous other budget travel "how-to" books. Unlike travel in the age of the Grand Tour or the novels of Henry James, America's great and fairly widely distributed wealth has democratized the taste and the means for travel.

#### A New Motivation: Concerns about Dementia

Moreover, a virtuous cycle is at work. Those at the stage of life when self-actualization become important naturally seek educational travel, and educational travel in turn promotes the sort of mental and brain health that makes self-actualization even possible. Mental stimulation has long been recommended as a key to successful and

happy aging. Now, as good physical health becomes common well into the ninth decade of life, the prospects of mental deterioration — dementia and, more specifically, Alzheimer’s disease — have grown, and become a cause for anxiety. Recommendations to stay mentally active have a dark edge; it’s no longer just “use it and be happy,” it’s “use it or lose it.”

In the more formal language of the medical profession: “Recent research findings are promising in regard to the possibility of modifying or forestalling the cognitive declines that typically occur with increasing age and preventing the risk of Alzheimer’s disease. There is a growing body of research that supports the notion of neural plasticity across the lifespan, suggesting that cognitive and physical stimulation helps to maintain perceptual and memory skills.”<sup>24</sup>

Indeed, the American Nurses Association has specifically recommended educational travel — and Elderhostel in particular — as a preventive health measure. “It is again encouraging to note that activities promoting cognitive health in the later years are neither expensive nor complex. Recommendations for enjoyable, readily available activities that promote cognitive health [include] ... educational trips through groups such as elder hostel [sic].”<sup>25</sup>

*American Fitness* magazine states the recommendation clearly and imperatively: “Strive to maintain a complex and intellectually stimulating environment throughout your lifespan. This can be accomplished through extensive reading, traveling, attending

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<sup>24</sup> “Cognitive Health in Later Life,” American Nurses Association, 2003

<sup>25</sup> “Suggestions for Promoting Cognitive Health in Late Life”, American Nurses Association, 2003

cultural events, participating in continuing education activities, clubs and professional associations.”<sup>26</sup>

The Baby Boomers, compared to the G.I. Generation, are slightly healthier and better educated, somewhat less confident about their economic prospects in retirement, fundamentally less group-oriented, hungry for “authenticity,” and drastically more media-saturated. They’re interested in educational travel not only because, like all aging adults with their basic needs satisfied, they’re interested in self-actualization, but also *consciously*, because they fear their bodies might outlast their minds and they’re interested in activities that might forestall senile dementia or worse. With this background, we’re ready to listen to Baby Boomers tell us what they want in educational travel.

### Educational Travel for Baby Boomers

After studying the psychological needs of aging people everywhere, and carefully researching the unique characteristics of the Baby Boom generation, we at Elderhostel developed a series of hypotheses about what Baby Boomers would look for in educational travel. Then, as part of the process of developing Elderhostel’s new brand, *Road Scholar*, we conducted focus groups and other surveys to determine if prospective participants saw things the same way, and compared our results to those of others that have researched the same questions. We found our hypotheses to be strongly supported by our research, and reflected in the findings of others. The educational travel features

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<sup>26</sup> “It’s All in Your Head: Slowing the Process of Mental Aging,” Rick Gardner, *American Fitness*, May-June, 2003

we hypothesized, and have subsequently built into Road Scholar programs, were as follows:

*Smaller groups.* Educational travel in large groups served the values of the G.I. Generation extremely well. For Baby Boomers, however, smaller groups help participants preserve at least the illusion of independence or, as one focus group participant succinctly put it: “[s]mall groups sound less structured.”<sup>27</sup> Smaller groups also make possible the style of learning we believe Baby Boomers will prefer (see below).

*Hands-on, experiential learning, behind-the-scenes access.* Media-saturated, authenticity-hungry Baby Boomers won’t sit still for passive, one-way lectures. They will want to learn by doing, and by engaging all of their senses in a direct experience with the subject matter. According to a recent consultants’ study: “[t] most prominent type of visitor experiences in demand were those that facilitated opportunities for visitors to reach into the host community, meet and socialize with locals, participate in community activities, and engage in cultural exchanges. Many of these experiences do not represent typical observational tourist activities; rather they involve hands-on participation in day-to-day community activities.”<sup>28</sup> To quote a prospective Road Scholar: “I like the idea of exploring. I have always been attracted to the kinds of trips that you go out and do things — like going to the community and being part of it.”<sup>29</sup> Or another: “It’s appealing to get the ‘inside scoop’ — to see the scenes behind the scenes, to feel that I’ve spent my time in a unique experience that not everyone can take part in. For example, I’d be more

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<sup>27</sup> Elderhostel/Road Scholar Focus Group, September, 2002

<sup>28</sup> “Defining Tomorrow’s Tourism Product: Packaging Experiences,” p. 3, Learning Through Leisure Consulting, 2004

<sup>29</sup> Elderhostel/Road Scholar Focus Group, September, 2002

interested in a ‘behind the scenes’ tour of Disneyworld than I would be going to Disneyworld itself.”<sup>30</sup> (Is it possible this prospective Road Scholar — hungry for an authentic experience at one of the world’s most contrived tourism destinations — grew up watching the Mickey Mouse Club on television?)

*Accommodations and meals “on theme” where feasible.* Listen to a 56-year-old man describing his dream trip: “Bicycling with my wife in the Loire Valley in France — good view, interesting historical sites, good food, just wandering around and experiencing, and staying at some nice and comfortable small hotels.”<sup>31</sup> In this man’s vision of an ideal educational voyage abroad, the experience is holistic — it touches every aspect of the day. In one sentence he’s invoked three senses (“good view,” “good food,” “comfortable hotels”), not to mention his mind (“interesting historical sites”). For the Baby Boomer educational traveler, every element of the program should be “on theme” to keep the experience at peak pitch.

*Plenty of free time — including many meals “on your own” — built into the schedule.* “Structured” free time takes the focus away from group activities and adds to the sense that the participant is engaged in a personal discovery, highly valued by Baby Boomers. Listen to four different prospective Road Scholars who participated in a 2002 focus group:

“[I] would like to see that there was [an] opportunity to separate from the group and be on my own. I want to have the chance to explore on my own.”

“You need time alone — unscheduled — to share or enjoy at your own pace. This lets you focus on your interests or what you hope to learn.”

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<sup>30</sup> Elderhostel/Road Scholar Focus Group, September, 2002

<sup>31</sup> Elderhostel/Road Scholar Focus Group, September, 2002

“When you are cycling, you are at your own pace. You can stop and wander more if you see something interesting. But you are still part of a group.”

“I want to hear or know something interesting and then have the quiet time to reflect on it, to think about it and to see how it fits with other things I have learned.”

Free time not only answers the need for a feeling of independence from the group, it gives participants a chance to engage the culture in a quieter, more personal way and to reflect on the peak experience they’re living. It’s a subtle but important distinction in the way Baby Boomers will consume experiences that facilitate self-actualization.

*Active programs.* Baby Boomers enjoy a high level of health and fitness, and they’re ready and willing to get moving to see the world. What’s more, many see activity as an end in itself. One focus group described an ideal trip as one that combined “recreation, exercise, and discovery.” Many particularly described cycling — an active way to cover a lot of ground without giving up the feeling of direct contact — as their preferred mode of educational travel.<sup>32</sup>

*Shorter programs with accessible pricing.* Baby Boomers — with the possible exception of their parents’ generation — will be the most prosperous retirees in human history. Still, after the collapse of the Internet stock bubble in 2000 and 2001, and because of uncertainty about the future of Social Security and Medicare, there are a few dark clouds on the retirement horizon for Baby Boomers. Many, as we’ve seen, expect to continue working past “normal” retirement age, at least in a part-time capacity. To answer the likely complex scheduling demands of the Baby Boomer couple, and to fit its

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<sup>32</sup> Elderhostel/Road Scholar Focus Groups, September, 2002

slightly-thinner pocketbook, any educational travel organization with large goals will need to offer shorter programs and price aggressively.

### What the First Road Scholars are Saying

In February 2004, Elderhostel mailed its first Road Scholar catalog, generating nearly 800 enrollments in 22 varied programs (all with multiple-departure dates). The first program operated in May 2004. The second catalog mailed in August 2004 and thus far has generated more than 900 enrollments.

In order to gauge expectations and determine what had motivated enrollment in programs in the first catalog, we send each registrant a “pre-departure” survey. In addition, as programs have operated, we’ve sent each participant a detailed program evaluation survey. One purpose of these surveys was to mine the open-ended comments for evidence that our assumptions about “what Baby Boomers will want from educational travel” were correct. Following is a series of representative comments, grouped by each of the program characteristics outlined above.

*Smaller groups.* “Very interested in visiting St. Petersburg in a small group.” (Pre-departure survey) “The size of the group [16] was, for me, perfect. I would not be as happy if the group had been much larger.” (Program evaluation of “Alaska: Enlightenment Under the Midnight Sun”) “I liked the size of the group [23] and the behind-the-scenes activities in which we were involved.” (Program evaluation of “New York Theater: Behind the Velvet Curtain”) “The size of the group [23] was great.” (Program evaluation of “The Art of Living: Italy’s Amalfi Coast”)

*Hands-on, experiential learning, behind-the-scenes access.* “Behind the scenes observation and info — not just the same-old on-the-bus, off-the-bus tour.” (Pre-departure survey) “For me, travel is the greatest learning experience. I want to ‘be’ in the place I visit — get a feeling for what it would be to live there. I don’t want to go to a new place and learn no more than I would be seeing a travelogue.” (Pre-departure survey) “I highly appreciated the informational talks about theater history with highly knowledgeable experts, general history of N.Y. and aspects of Time Square in particular, visits to the theater costume department and an auditioning session with younger actors.” (Program evaluation of “New York Theater: Behind the Velvet Curtain”) “At the end of the program, my husband and I agreed that we had become so immersed in NY Theater, it as hard to remember what our ‘real life’ was; we didn’t want to go back to reality!!!” (Program Evaluation of “New York Theater: Behind the Velvet Curtain”) “Glad we were able to view an autopsy in progress.” (Program Evaluation of “Forensics: Extracting the Evidence”)

*Accommodations and meals “on theme” where feasible.* “Meeting with University professors and students sounds terrific, especially cooking dumplings for lunch with the students.” (Pre-departure survey) “Great group leader, itinerary, lodging, bikes, group, and weather. Would be hard to improve on anything.” (Program evaluation of “The Elbe River by Bicycle”) “The locations we stayed in were ideal.” (Program evaluation of “The Art of Living: Italy’s Amalfi Coast”)

*Plenty of free time — including many meals “on your own” — built into the schedule.* “I like the ideas of some instruction but balanced with free time.” (Pre-departure survey) “Does not sound like the typical scheduled tour because it has



opportunities to see and do ‘behind the scenes’ activities. Free time is important so that we don’t feel that we are scheduled all day with a group.” (Pre-departure survey) “I like having meals on my own, especially since I am on a special diet.” (Program evaluation of “The Art of Living: Italy’s Amalfi Coast”) “Loved the Hermitage and the free time to explore it.” (Program Evaluation of “Politics, Art and Culture in the New Russia”)

Sometimes a negative comment indicates that we weren’t scrupulous enough about adhering to our own program criteria: “The only problem with the program was that all the free time happened when the town were closed for the day ... the local museums and galleries were closed ... This made it hard to get to know the people in the towns and their way of life.”

*Active programs.* “I love Europe, but am not interested in bus tours where you get on the bus, someone lectures and you fall asleep because the bus is humming down the road. I wanted some physical activity built into the program.” (Pre-departure survey)

As this evaluation indicates, and as we would expect, a high level of activity is more important than group cohesion: “On our trip, one participant was not able to do the walking. Perhaps you could stress fitness more by including query of current level of activity ...”

*Shorter programs with accessible pricing.* Programs for Road Scholar were consciously developed to be shorter than Elderhostel programs — to be more accessible to potential participants still working full- or part-time as, indeed, 38% of participants are. In our pre-departure survey, 79.8% of respondents agreed that the length of the program strongly or moderately influenced their decision to enroll. Only “content was what I wanted” and “small group size” ranked higher as influencers in the enrollment

decision. The acceptance of price is harder to gauge. On the one hand, “on theme” meals and accommodations tend to drive price up, as does a smaller group size over which fixed expenses must be amortized; on the other hand, built-in free time tends to drive prices down. Perhaps the best indication of the acceptance of Road Scholar price points is that programs from the first catalog operated at 81% fill rates.

### Conclusion

Educational travel will be a highly sought experience for Baby Boomers approaching or in retirement, just as it was for their parents’ generation, because educational travel answers a deep-seated urge — self-actualization — that all aging people have who are lucky enough to have their more basic needs met.

For Baby Boomers, however, the “style” and some other aspects of how the educational travel product is packaged and delivered will need to change.

Because many Baby Boomers will continue to work at least part time past “normal” retirement age, and because financial security will be a greater concern for Baby Boomers than it was for their parents, educational travel programs must be shorter to fit into busy schedules and to keep price points affordable.

Perhaps more importantly, educational travel, to fit the independent, anti-authoritarian, less group-oriented “style” of the Baby Boom generation, must conform to the following specifications:

- Small group size,
- Hands-on experiential learning with behind-the-scenes access,
- “On theme” meals and accommodations,

- Plenty of free time — including many meals “on your own” — built into the schedule, and
- Lots of activity.