Report on the 2022 National Survey of the Osher Lifelong Learning Institutes' Membership

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The Osher Lifelong Learning Institute (OLLI) network began with a single program at the University of Southern Maine in 2001. Today, it is comprised of 125 university/college-based lifelong learning programs across the United States. Each OLLI has received endowment funding from The Bernard Osher Foundation and continues to receive a variety of services from the National Resource Center for Osher Lifelong Learning Institutes (Osher NRC) at Northwestern University. The OLLI network's total enrollment is currently about 117,000 members. In general, OLLI members are at least 50 years old and retired from full-time employment, but OLLI programs and members differ in backgrounds, interests, and experiences across the Network [1].

This report presents the results of the fifth national membership survey of a representative population of the OLLI network, conducted in the fall of 2022 by the Osher NRC. Over the years, the NRC's membership survey has had four recurring purposes: (1) identify demographic characteristics of the OLLI membership; (2) ascertain the extent to which the OLLI population reflects often-discussed characteristics of older adult lifelong learners; (3) identify course topic interests; and (4) gauge OLLI members' experience with and attitudes toward online learning. The first survey was conducted in 2014, and the core survey questions have remained the same over the years with some refinement. Beginning in 2016, a final element of each survey has been the exploration of one topic of interest through an open-ended question. This question is selected by the Research Review Committee (RRC) of the Osher NRC. The 2016 survey investigated OLLI members' perceptions and realizations regarding the value of lifelong learning to older adults [2]. The 2018 survey asked about OLLI members' satisfaction with relationships [3, 4, 5, 6]. The 2020 survey asked participants how online learning opportunities offered by their OLLI program had or had not fostered a sense of community with other members. And in the 2022 survey, participants were asked what they would change about their OLLI program to make it more meaningful and enriching for OLLI members. This question followed additional new questions prompting members to reflect on their primary sources of personal self-worth/significance and how OLLI participation contributes to these perceived sources. This report will focus on the four recurring purposes comparing results of the 2022 survey to results of 2020 and, when illustrative, earlier years.

The five national surveys were conducted during three very different eras for lifelong learning and older adults. Prior to the COVID-19 pandemic, from 2014 – 2018, OLLI programs were dominantly in person. By the 2020 survey, Osher Institute program courses and other activities shifted to online instructional models due to COVID-19 pandemic restrictions [1]. As higher education and communities moved beyond the COVID-19 pandemic in 2022, OLLI programs showcased a mix of in-person and online activities. Thus, the context for each of the five surveys has varied over time.

Methodology

A. Survey Development

All five surveys were developed by the authors and then refined through discussions with the Research Review Committee of the Osher NRC. The 2016 and 2018 surveys were administered in both online and paper copy formats; the 2014, 2020, and 2022 surveys were administered online only. The questionnaire was written and distributed in English.

The full survey instrument utilized in 2022 is included as Appendix 1. Questions 1-8 and 14-18 of the 2022 survey are the same as in 2020. Questions 9 and 10 of the 2022 survey (years of membership and volunteering in OLLI) had not been posed in earlier years. Questions 11-13 in both 2022 and 2020 surveys addressed online learning. In 2022 these questions focused on learning modalities participants had engaged in (in-person, online, hybrid) and their preference of learning modality. In 2020, the focus was more on prior experiences with online learning and challenges encountered when using this modality in the OLLI context. As mentioned earlier, the final (open-ended) question in 2022 differed from that in 2020, like previous surveys. Overall, most questions are consistent across the five survey years, allowing for analyses of trends.

B. Survey Sample

The Research Review Committee of the Osher NRC chose fifteen OLLI programs that exemplify the locations, program size, host university characteristics, and program ages of the OLLI network as a whole. These are listed in Table 1. The first survey (2014) included eight of these programs, and the number has been gradually expanded in subsequent years to be more representative of the entire OLLI network. The characteristics of the original eight programs remain mostly stable across the five years. As this is a broader study, note that comparisons across years consider all programs included each year (in addition to the eight) in our descriptive statistics and statistical comparisons.

The selected OLLI programs were responsible for distributing information about the survey process. OLLI programs distributed information via electronic communication mediums, such as direct emails, email newsletters, and social media. These programs were allowed to tailor their messaging; however, the Osher NRC did provide initial language about the survey. Additionally, each program could add three or four of their own local questions at the end of their particular survey.

A total of 5,354 individuals from fifteen OLLI programs responded to the 2022 survey. A total of 5,049 (94.3%) of these responses were deemed suitable for data analysis by the authors of this report. A survey was not used if the respondent did not consent to participation or did not indicate both their age range and gender. The age and gender requirements were imposed because of the importance of sorting responses by these two variables in the trend analyses. Using the 2021-22 membership of each participating program, the response rate of usable responses was approximately 32%. This survey response rate is sufficient, consistent with many of today's social science research studies [7].

C. Survey Process

Prior to administration, the survey questionnaire and process were reviewed and approved (as an exempt study) by the Institutional Review Board at Northwestern University. This approval was provided to the host institutions of the 15 participating programs for their review. Informed consent protocols were followed, such that OLLI members were asked if they were willing to voluntarily participate in the survey process.

The Osher NRC administrated the survey, providing Osher Institute directors with an individualized link to their survey in SurveyMonkey (including both the core survey questions, plus three or four additional questions they chose to pose to their own membership). OLLI directors then distributed the survey to their membership. The SurveyMonkey data for all responses from each program were exported into separate Excel spreadsheets. To ensure confidentiality, the IP address of each respondent (the only possible identifying information collected) was discarded before the data were analyzed. The spreadsheets for each program were then combined into a single consolidated spreadsheet for analysis of the composite data set.

Results

The following includes 2022 survey results for all fifteen programs in the areas of age, gender, marital status, ethnicity, LGBTQ identification, educational attainment, technology utilization, relocation history, experiences with and preferences for various in-person, online, and hybrid learning modalities, and course topic preferences. Additionally, sources of self-worth and significance selected by survey participants are identified. Selected comparisons of 2022 data with that of earlier surveys are offered.

A. Age and Gender

Figure 1 shows the distribution of respondents by age and gender. The X-axis is the percentage of individuals in each age range, and the Y-axis the age range. As was observed in the 2020 survey, the 70-74 age range contains the largest proportion of respondents. Consistent with previous survey iterations, women proportionally outnumber men across most of the age spectrums. The male-to-female ratio is shown in Table 2 for each survey year. The change from 2020 to 2022 is not statistically significant. Nonbinary/non-cisgender gender was not reported in 2020, and only five individuals identified as such in 2022. And, as in 2020, Figure 2 shows that the male-to-female ratio within each age range increases with increasing age, such that women proportionally outnumber men, but this proportion is smaller among the older age groups.

Perhaps the most important change in the OLLI population between 2014 and 2022 is the skewing of the age distribution toward older ages. A convenient way to measure this trend is in terms of the percentage of the population age 70 and above. Table 2 shows that this ratio has increased from 51.8% in 2014 to 73.5% in 2022. The differences between the 70 and above population in successive survey years (2014 and 2016, 2016 and 2018, and 2018, 2020 and 2022) are all statistically significant ($p < .05$). For the 70 and above population in 2020 and 2022 ($\chi^2 = 28.99$, $p < .001$).

B. Marital Status

The marital status of 2022 survey participants is consistent with 2020 reported marital status; a majority of survey respondents indicated they are married/partnered (62.0% in 2022 vs. 63.8% in 2020). Single participants made up 21.6% in 2022 compared to 21.4% in 2020. The corresponding percentages of widowed participants were 16.0% and 14.8%.

C. Race/Ethnicity

In each of the last four national surveys (2016, 2018, 2020, and 2022) participants have been asked their racial identity [3, 4, 5, 6]. The categories are the same as used by the U.S. Census Bureau [8]. The results for each survey year, along with the average for the four surveys, are shown in Table 3, along with the total non-White population of participants. Black/African American participants are the largest non-White group, followed by Hispanic/Latino and Asian participants. Small variations are observed between survey years for all racial groups and for the total of non-White participants.

To put the percentages of non-White participants in the context of the broader U.S. population, data are drawn from the 2020 Census to determine the percentage of 60 and above, college-educated (bachelor's degree or above) individuals who are non-White and more specifically are Black/African American, Hispanic/Latino, and Asian [9]. This comparison is relevant because the large majority of OLLI participants are age 60 or above and have a bachelor's degree or higher. We see from Table 3 that the total non-White population of the U.S. in this subgroup is 15.5% of the total for the country, compared to 6.7% for the OLLI survey participants in 2022. The corresponding results for Black/African Americans is 7.6% compared to 3.5%; 5.0% compared to 1.3% for Hispanic/Latinos; and 7.0% compared to 1.0% for Asian Americans. In other words, older, college-educated non-White individuals are slightly less than one-half the percentage in the OLLI survey participants as in the U.S. population as a whole. And this difference varies across different racial groups.

Given that the majority of the OLLI survey participants are 65 and older (91.1%), a better comparison might be with Census data for this age range. Table 3 shows this comparison reduces the bachelor's and above percentage of non-White from 15.5% to 14.4% and the Black/African American percentage from 7.6% to 6.9%. The percentages for Hispanic/Latino and Asian are consistent with those given in Table 3 for 60 and above.

D. LGBTQ Identity

Table 2 shows the percentage of participants identifying as LGBTQ in the three survey years in which the question was posed. We see only a modest variation between 2022 (3.1%) and 2020 (3.4%). These rates are roughly half of reported estimates of the number of lesbian, gay, bisexual, and transgender adults that are 65 and older, which is around 6.2% nationally [10].

E. Education Completed

Figure 3 shows the percentage of the 2022 survey respondents who have completed various levels of education, ranging from some high school to doctoral and non-doctoral professional degrees. Most evident is the high education level of OLLI respondents, with 91.8% having a bachelor's degree or

higher. This percentage is much higher than the 32.8% of the entire U.S. 65-and-over population with bachelor's degrees. [9].

Table 2 compares the percentage of survey respondents who have a bachelor's degree or higher for the five survey years. We note a slight but perceptible increase in this percentage from 2014 to 2020. The difference between 2018 and 2020 is statistically significant ($\chi^2 = 7.00$, $p < .01$), as is that between 2018 and 2022 ($\chi^2 = 5.32$, $p < .05$). But the difference between 2020 and 2022 is not statistically significant.

F. Employment

In each of the five survey years, the same question has been posed regarding status of work engagement: full-time, part-time, or looking for work. This question is important for lifelong learning programming in that work introduces additional time demands and schedule constraints on respondents. Table 2 shows the total percentage of respondents working or looking for work in each of the five surveys. The total percentage of respondents working or looking for work has decreased over time, from 20.2% in 2014 to 11.7% in 2022. The differences in the percentage of respondents working or looking for work in 2014, 2016, and 2018, and 2020 have previously been discussed as statistically significant ($p < .05$). Likewise, the difference between 2018 and 2022 is statistically significant ($\chi^2 = 15.8$, $p < .01$); but that between 2020 and 2022 is not.

G. Relocation

In the 2016, 2018, 2020 and 2022 surveys, respondents were asked the number of years since their relocation. As is evident in Table 2, the total percentage of respondents who have relocated in the past nine years went up slightly from 2016 to 2018, but the 2020 and 2022 results were very similar to 2018. Individual programs have much more substantial variations around these averages in 2022, as was also the case in previous years.

H. Computer/Tablet and Smartphone Utilization

In this study, both desktop/laptop computers and iPads/tablet devices are considered "computers" in that they are gateways to the virtual worlds of email, social networks, online courses, and the internet. The percentage of OLLI members reporting that they use a laptop/desktop computer and/or an iPad/tablet is consistently in the 99% range across the survey years. In contrast, smartphone use has almost doubled over this period (47.5% in 2014 to 92.5% in 2022). These trends are depicted in Table 2. Note that the increase from 2020 to 2022 is statistically significant ($\chi^2 = 23.06$, $p < .001$).

I. Social Media Utilization

Social media utilization held relatively steady from 2020 to 2022, as measured by the percentage of participants indicating that they rarely or never use social media. As shown in Table 2, this suggests that the trend of increasing social media use from 2014 through 2020 has not continued to the present time.

Responses to question 8 reveal that the four most popular platforms in 2022 (as well as 2020) were Facebook (49.9%), YouTube (42.0%), Instagram (17.7%), and LinkedIn (12.3%). The corresponding percentages in 2020 for Facebook and LinkedIn were comparable to 2022. YouTube utilization decreased slightly from 2020 to 2022 (47.7% to 42.0%) and Instagram increased (16.5% to 17.7%).

J. Length of Membership and OLLI Volunteering

For the first time, in 2022, participants were asked how long they had been OLLI participants (question 9) and whether or not they serve in any volunteer capacity in their program (question 10). Slightly over one-third (36.2%) have been participants for seven years or more. 23.5% have been involved for two years or less, 20.5% for three or four years, and 19.5% for five or six years. Slightly over one-quarter of participants (26.1%) indicate that they volunteer in their OLLI in some capacity.

K. Learning Modalities: Current Experiences, Preferences, and Perspectives on Online and In-Person OLLI Offerings

As noted earlier, the last three OLLI surveys (2018, 2020, and 2022) have been administered in three distinct learning environments. In 2018, almost all OLLI classes were in person. In the Fall of 2020, when the survey was administered, most programs had migrated to the online environment following the onset of the COVID-19 pandemic. As the world gradually emerged from the pandemic in 2022, this survey was administered across OLLI programs offering mixes of in-person, online, and hybrid classes. These context shifts provide opportunities for lifelong learning programmers to understand how the attitudes of OLLI participants toward online and in-person learning have changed and what these changes may imply about the mix of learning modalities required in the future.

The potential of online or hybrid (online and in-person learning) was evident in the 2018 survey [5]. That year, 49.9% of respondents indicated that they would be “very likely” or “somewhat likely” to take an OLLI course that was online or hybrid. By 2020, 69.4% of participants had actually taken at least one OLLI course online in the two-year period prior to the 2020 survey. The percentage of participants who had participated in a hybrid OLLI course at that point was very small (3.6%), probably because of the transition from largely in-person in 2018 to almost exclusively online in the Fall of 2020.

The 2022 survey reveals what learning modalities are currently being experienced at OLLIs (question 11), what modalities participants now prefer for the majority of their classes (question 12), the reasons for participating in online or hybrid classes (question 13), and the primary barriers to returning to the in-person learning environment (question 18). Participants were asked about current experiences and preferences for four learning modalities: in-person, both in-person and online availability, live online, and online recorded for access at the participant’s convenience. At the time of the survey, 49.7% were taking at least one in-person class, 36.9% a class offered live online, 11.8% a class that is online and recorded for later use, and 16.8% a course that is offered both in-person and online. (These percentages total more than 100% because some survey participants take courses in more than one format.)

The modality preferred by participants is somewhat different than their current OLLI experience. 55.2% prefer in-person classes. The remainder prefer a hybrid format (20.2%), a live online format

(21.0%), or an online format that is live but also recorded so that it can be watched at a later time (3.2%). Stated differently, slightly over half of participants prefer in-person classes and slightly less than half prefer classes that are available partially or fully online.

The motivations for these preferences are perhaps best understood by the response to survey questions 13 (reasons for participating in online classes) and 18 (challenges to in-person involvement). Schedule flexibility was the most frequently cited reason for online participation (42.9% of participants) This was followed by transportation issues (commute time, parking, etc.), cited by 25.5% of participants. Though not offered as an answer to this question, 7.6% of participants entered "COVID-19 concerns" in the "other" category. All other reasons for online involvement were noted by 5.6% or less of survey participants.

The dominant challenges to in-person involvement identified were COVID-19 concerns (18.4% of participants), time (15.4% of participants), and transportation (9.7% of participants). All other challenges to in-person participation were cited much less frequently (4.8% or less). Not surprisingly, then, schedule flexibility is equated with time, the same three items are both the dominant reasons for online participation and barriers to in-person participation.

The responses to questions 12, 13 and 18 show a significant relationship between preferred learning modality and dominant reasons for online participation and challenges to in-person participation. Specifically, those preferring an online learning modality (live online, online via recording, hybrid in-person and online) much more frequently note their appreciation of the advantages of online learning and challenges of in-person learning than those preferring in-person learning. This is evident from Table 4. Of the 44.3% of participants preferring an online or hybrid format, 62.6% noted schedule flexibility and 45.5% transportation as reasons for online learning. By contrast, the corresponding percentages of those preferring in-person learning were 27.2% and 9.6%. Similarly large differences are noted in indication of challenges to in-person learning. All of these differences in responses of those preferring online/hybrid and in-person learning are statistically significant. For example, the difference in responses of the two groups to Schedule Flexibility as a reason for online learning has $\chi^2 = 241$, $p < 0.001$.

Taken together, these results suggest the following about online learning formats:

1. Having now had experience with both in-person and online learning, both modalities are preferred by substantial proportions of the OLLI population. This suggests that OLLI programs need to support both in-person and online learning experiences.

2. The relative importance for any given OLLI program of in-person and various online/hybrid formats may be indicated by such local factors such as transportation difficulties (traffic, parking, frequency of inclement winter weather).

3. Appreciation for various formats (live in-person, live but recorded for later viewing, option for both in-person and online participation) grows from a combination of time, transportation, and health-related considerations. At present, the online format recorded for either live or later viewing is not selected as a preferred format, perhaps in part because it is currently being experienced by a small percentage of survey participants (11.8%). But the factors that are

identified as strengths of online learning and challenges of in-person involvement (time constraints or schedule flexibility, transportation concerns, etc.) might be best addressed by offering this modality for the benefit of OLLI members.

L. Topic Areas of Greatest Interest

An important question for OLLI programming is the participants' highest areas of topical interest for course offerings and other types of learning experiences. In the 2022 survey, respondents were asked to indicate their top three choices of interest from a list of 13 content areas shown in the survey (question 17). An identical question was asked in all previous surveys with the exception of the 2014 survey which did not include an option of "Travel."

The ranking of these 13 topic areas, based upon percentage of survey respondents listing the area as one of their top three, is shown in Figure 4. These results for 2022 are very similar to 2020. Also shown is a preference by age range for 70 and above, and 69 and below. The age-group differences are statistically significant ($p < .05$) for History, Current Affairs, Literature, Health and Wellness, Travel, Crafts and Hobbies, Foreign Languages, and Photography.

The gender differences in topic preferences are very similar to those reported in 2020. For example, 52.7% of women and 35.5% of men selected Fine Arts as a preference in 2022, whereas the corresponding percentages in 2020 were 53.3% and 35.3%. History was a preference of 61.5% of women and 70.3% of men in 2022, while the corresponding results in 2020 were 61.4% and 70.3%.

M. Sources of Self Worth and Significance

While the 2022 survey is the fifth national survey of OLLI participants, it is the first where participants were asked about their primary sources of self-worth/significance. Insights into this topic for retirees are provided by previous interview studies [11, 12, 13]. (More general studies of happiness and well-being, such as the long-running Harvard study [14] are also helpful). These earlier studies suggest that retirees derive a sense of self-worth/significance from friendships, family relationships, intellectual and creative growth, spiritual growth, giving care to a loved one, and volunteer or second career activities that they "retire to." Far less frequently mentioned by retirees in these studies are financial wellbeing and past professional accomplishments.

Drawing upon insights from these past studies, Question 19 of the survey asked participants about how important eight potential sources of self-worth/significance are to them. There was also an option to identify one not included, as an "Other" in the survey. Participants were asked to select up to three options. The results for the eight choices offered are given in percentage of participants in Table 5, along with a breakdown of these results by age range, gender and educational level (masters and above, bachelors and below)78).) It is notable that Intellectual Growth is most often identified, followed by Friendships, Family Relationships, Volunteer/Second Career activities, and Creative Growth. Financial Well-Being, Spiritual Growth, Professional Accomplishments, and Caregiving were less frequently noted. The most frequently mentioned source of self-worth/significance noted in the "Other" category relates to fitness/exercise/physical activity (about 1% of participants). Other sources mentioned less often are travel and music. Application of the Chi Squared Test ($p < .05$) shows a statistically significant difference in how important various sources of self-worth/significance are,

depending on age range, gender, and educational level. These statistically significant differences are shown in bold type in Table 5. For example, Creative Growth and Volunteer/Second Career activities are substantially more important for survey participants aged 69 and below than those 70 and above.

Question 20 also explores the contribution of OLLI participation to the areas of Intellectual Growth, Creative Growth, Friendships, and Volunteer/Second Career activities. Participants were asked to indicate the extent to which OLLI participation has contributed to each of these areas using a five-point scale: strongly agree, agree, neutral, disagree, strongly disagree. A large majority of 91.6% strongly agreed or agreed that OLLI participation is important to Intellectual Growth. The corresponding percentages for Creative Growth, Friendships, and Volunteer/Second Career activities are 57.3%, 50.0%, and 31.2%.

N. OLLI Program Ratings

Question 21 requested each participant to assign an overall rating to their program on a five-point scale, ranging from Outstanding to Unacceptable. This measure was included for the first time in the national surveys. The most common rating is the highest (Outstanding: 38.1%), followed by 30.2% assigning an Exceeds Expectations rating, 25.6% assigning a Meets Expectations, 4.7% stating their program is in need of improvement, and only 0.1% assigning a rating of Unacceptable. Just 1.3% of survey participants did not assign a rating.

O. Individual Program Variability

As noted at the beginning of this report, the fifteen OLLI programs participating in the survey were selected because they together represent the variability of OLLI programs at different universities or colleges. The extent of this variability is evident in Table 6, comparing selected average results for all survey participants with the lowest and highest average of an individual program. All results in this table are in percentages. To take two examples from the table, the percentage of all participants aged 70 and above is 73.5%, but the value for individual programs in the survey ranges from 56.8% to 82.1%. The percentage preferring in-person learning is 55.2% for all survey participants, but among the surveyed programs, this value ranges from 29.3% to 82.9%. These differences suggest the importance of studying further how they may be reflective of the unique characteristics of the community served by the OLLI program or other factors specific to individual programs.

P. Changes that would make OLLI Programs More Enriching/Meaningful

The final question of the survey was an open-ended question about changes that might be made to their OLLI programs that would make them more enriching and meaningful. The qualitative analyses of the responses to this final survey question of 2022, along with resulting conclusions, will be reported separately.

Conclusions and Further Study Planned

A. Demographics

A striking result found in our previous report on the 2020 data is that the Osher Lifelong Learning Institute Network continues to experience an increase in average participant age, as measured by the steady increase in percentage of respondents aged 70 and above. Women persist in outnumbering men across the age ranges, but less so in older age groups. The exploration of how to better attract men to lifelong learning programs continues to be a question to explore within OLLIs and across universities interested in bolstering age-friendliness [3, 15]. Consistent with previous surveys, OLLI learners continue to reflect mostly White racial/ethnic backgrounds, which has been a notable concern and opportunity for OLLIs as a whole [1]. Additionally, the sample showcases lower estimates of LGBTQ persons compared to national estimates for older adults [10]. Further statistical examinations of the data may showcase course topic preference differences that attract non-White persons, younger members, LGBTQ persons, and men as well.

Consistent with 2020, most OLLI learners are partnered or married. Men continue to be married or partnered proportionally compared to women. Though not observed causally, anecdotal reflections of OLLI men point towards their wives being strong factors in introducing them to OLLI programs as well as companions in the classroom [10]. Outreach to single men may be a future opportunity for OLLIs.

B. Other Relevant Characteristics of Learners

Relocation and retirement trends held steady between 2020 and 2022. These findings are consistent with trends observed by the U.S. Census showing that retirement rates did not substantially shift as a whole during the COVID-19 pandemic [16]. Still, OLLIs may do well to conduct self-studies of those who have relocated to their area, given retirement differences across career fields during the pandemic [16].

Technological proficiency remained steady, but smartphone use increased. Given the aging of OLLI participants observed, these findings are consistent with expert predictions and expected cohort effects [17]. OLLI members are now quite open to online learning, with online or hybrid modalities preferred to in-person learning by close to 45% of survey participants. The current study identifies transportation, time/schedule, and COVID concerns as primary factors in selection of preferred learning modality. Further research at the individual program level has the potential to further refine an understanding of why particular learning modalities are dominant in some circumstances but not others.

C. Topics

The topics preferred are consistent with previous studies [1, 2, 4]. Surveys noted some variations between younger members and older members. Self-studies of enrollment and surveys of OLLI learners within Institutes can help evaluate which topics to pursue in courses; however, these findings provide a starting point.

D. Final Notes

Additional studies of the differences and how they relate to the communities served by these programs have real potential. As noted earlier, due to the great variation amongst OLLIs, the NRC has plans to explore noted differences further in future publications and presentations. Readers of this report should reference the Osher NRC website for publication listings and are encouraged to use this research to inform their own local Institute study. Sharing of local results with the national network of Osher Lifelong Learning Institutes is welcomed.

The Osher NRC is committed to continuing national membership survey research on an every-other-year basis. Results are compared to previous studies and used to further operational improvement at OLLIs throughout the Network. This is part of the ongoing work of the Osher NRC, to benefit the OLLI Network and to contribute to the scholarly discovery of the impact of lifelong learning institutes on the lives of older adults.

Biographies of Authors

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Appendix 1: Survey Questionnaire

2022 Osher Institutes Membership Study Questionnaire

1. What is your age?
   a. Under 54
   b. 55-59
   c. 60-64
   d. 65-69
   e. 70-74
   f. 75-79
   g. 80-84
   h. 85 +

2. I identify as…
   a. Female
   b. Male
   c. Nonbinary/non cisgender

3. What is your marital status?
   a. Married/Partnered
   b. Single
   c. Widow(er)

4. Would you consider yourself a member of the LGBTQIA+ community?
   a. Yes
   b. No
   c. Prefer not to answer

5. What do you identify as your primary race?
   a. American Indian or Alaska native
   b. Asian
   c. Black or African American
   d. Hispanic or Latino
   e. Native Hawaiian or other Pacific Islander
   f. White
   g. Two or more races
   h. Other (please specify)

6. What is the highest level of education you have completed?
   a. Grade school or some high school
   b. High school, diploma or GED
   c. Associate's degree or equivalent
   d. Bachelor's degree or equivalent
   e. Master's degree or equivalent
   f. Doctoral degree
   g. Other terminal professional degree (non-doctoral)
   h. Other (please specify)

7. Which, if any, of the following technologies do you use? (Check all that apply)
   a. Laptop or desktop computer
   b. iPad or other tablet device
   c. Smart phone (iPhone, Android, Blackberry, etc.)
   d. Smart wearable device (iWatch, Fitbit, etc.)
   e. Other (please specify)

8. Which of the following social media sites do you routinely use? (Check all that apply)
   a. Facebook
   b. YouTube
   c. Pinterest
   d. Twitter
   e. LinkedIn
   f. Instagram
   g. TikTok
   h. I rarely or never use social media
   i. Other social media site, (please specify)

9. How many years have you been a member of your Osher Institute?
   a. Two or fewer
   b. Three or four
   c. Five or six
   d. Seven or more

10. Do you volunteer for your Osher Institute?
   a. Yes
   b. No

11. During the current fall 2022 term, are you taking at least one Osher course that is: (check all that apply)
   a. In-person
   b. Live online
   c. Online (viewed later via recording)

d. Both in-person and online
e. Not applicable

12. What is your preferred method for taking **the majority** of your classes/courses?
a. In-person
b. Live online
c. Online (viewed later via recording)
d. Option for both in-person and online (hybrid/blended/HyFlex, etc.)

13. What are your reasons for participating in online classes/courses: (check all that apply)
a. Not applicable (I only participate in-person)
b. Schedule flexibility
c. Transportation concerns (commuting, parking, weather)
d. Caretaking responsibilities
e. Physical barriers (hearing, vision, mobility, illness)
f. Language barriers
g. Other (please specify)

14. What is your current employment status?
a. Never employed
b. Fully retired
c. Work part-time
d. Work full-time
e. Currently seeking employment

15. How many years ago did you leave full-time employment?
a. 1 – 2 years
b. 3 – 5 years
c. More than 5 years
d. I did not work full-time outside the home
e. Not applicable, I am still working full-time

16. When did you move to the community/area in which you now reside?
a. Within the past three years
b. 4 – 6 years ago
c. 7 – 9 years ago
d. More than 10 years ago
e. I have lived here for most or all of my life

17. What are the primary areas of interest in the Osher courses or discussion groups you participate in? (Choose up to three)

a. Fine arts (e.g., music, theatre, studio art, film)
b. Literature
c. Foreign languages
d. History (regional, United States, International)
e. Current affairs/public policy
f. Business, finance, economics
g. Science and mathematics
h. Technology and computing
i. Photography
j. Crafts, hobbies, games
k. Health and wellness (e.g., exercise, nutrition)
l. Religion, philosophy, spirituality
m. Travel programs

18. Are there any challenges to your **in-person** involvement in Osher courses or events? (Check all that apply)

a. Cost
b. Hearing
c. Vision
d. Language
e. Physical mobility
f. Time
g. Transportation
h. Health
i. COVID-19 concerns
j. No challenges
k. Other (please specify)

19. In your current stage of life, what are your primary sources of a sense of significance or self-worth? (Select up to three)

a. Caregiving for a loved one or friend
b. Continued intellectual growth
c. Creative pursuits (e.g., painting, photography, writing, etc.)
d. Family relationships
e. Financial well-being
f. Friendships
g. Professional accomplishments
h. Spiritual life
i. Volunteer or encore career in which my efforts benefit others
j. Other (please specify)

20. To what extent do you agree that your participation in OLLI has contributed to the following? (5-point scale: (5– Strongly Agree, 4– Agree, 3- Neither Agree nor Disagree, 2- Disagree, 1- Strongly Disagree)
   a. My current network of friendships
   b. My continued intellectual growth
   c. Enhancement of my creative pursuits
   d. Volunteer experiences in which my efforts benefit others

21. Rate your experience with your Osher Institute.
   a. 5-point scale: (5– Outstanding, 4– Exceeds Expectations, 3- Meets Expectations, 2- Needs Improvement, 1- Unacceptable)

22. Is there something you would change about your Osher Institute program to further enrich your life and make it more meaningful?

Appendix 2: Tests of Statistical Significance

Chi squared tests were employed to determine the statistical significance of the difference between quantities, both within the same survey and also between surveys. The calculations were performed with an add-on statistical package to Excel provided by Real Statistics.

Table 1: Overview of Participation in 2022 Survey

Institution	Survey Dates 2022	2021-2022 Membership Total	Survey Count 2022	Usable Survey Count 2022	Percentage of 2021-22 Membership
Aquinas College	10/10 - 10/31	1150	238	232	20%
Boise State University	10/03 - 10/24	1116	511	490	44%
Colorado State University	10/31 - 11/18	684	207	193	28%
Furman University	10/07 - 10/31	1,900	774	743	39%
Hampton University	10/04 - 10/25	712	161	146	21%
Northwestern University	10/16 - 11/06	1211	317	301	25%
San Francisco State University	10/24 - 11/11	816	314	293	36%
University of California Irvine	9/22 - 10/13	428	103	89	21%
University of Connecticut	9/12 - 10/03	408	275	261	64%
University of Delaware	9/26 - 10/16	2610	1026	971	37%
University of Kansas	10/03 - 10/24	1185	363	335	28%
University of Miami	10/24 - 11/11	751	252	226	30%
University of New Mexico	10/24 - 11/11	736	214	202	27%
University of North Texas	9/16 - 10/07	691	140	130	19%
University of Southern Maine	10/15 - 11/05	1214	459	437	36%
TOTALS		15612	5354	5049	32%

Figure 1: Survey Population Age & Gender Distribution, 15 Programs
(percent of participants in each age range)

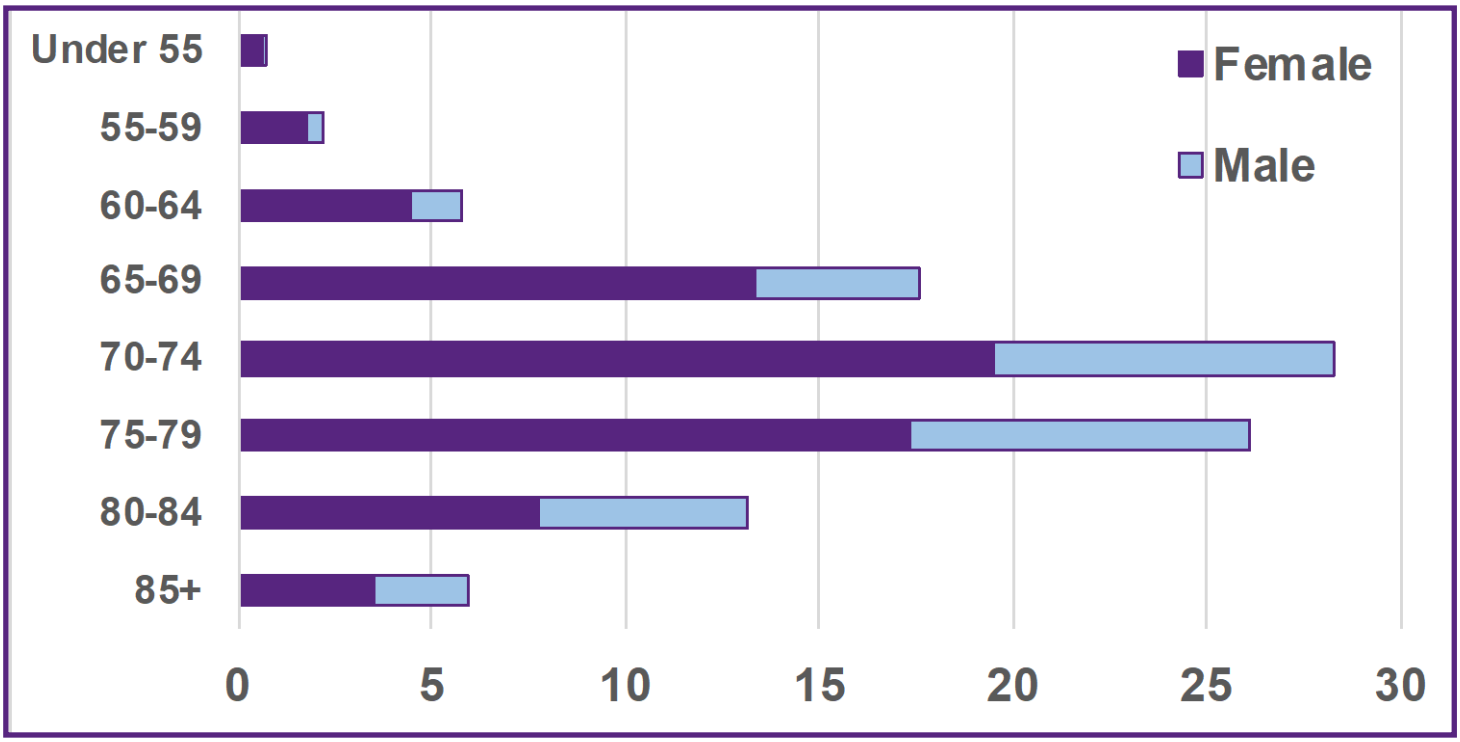

Figure 2: Ratio of Male to Female Participants

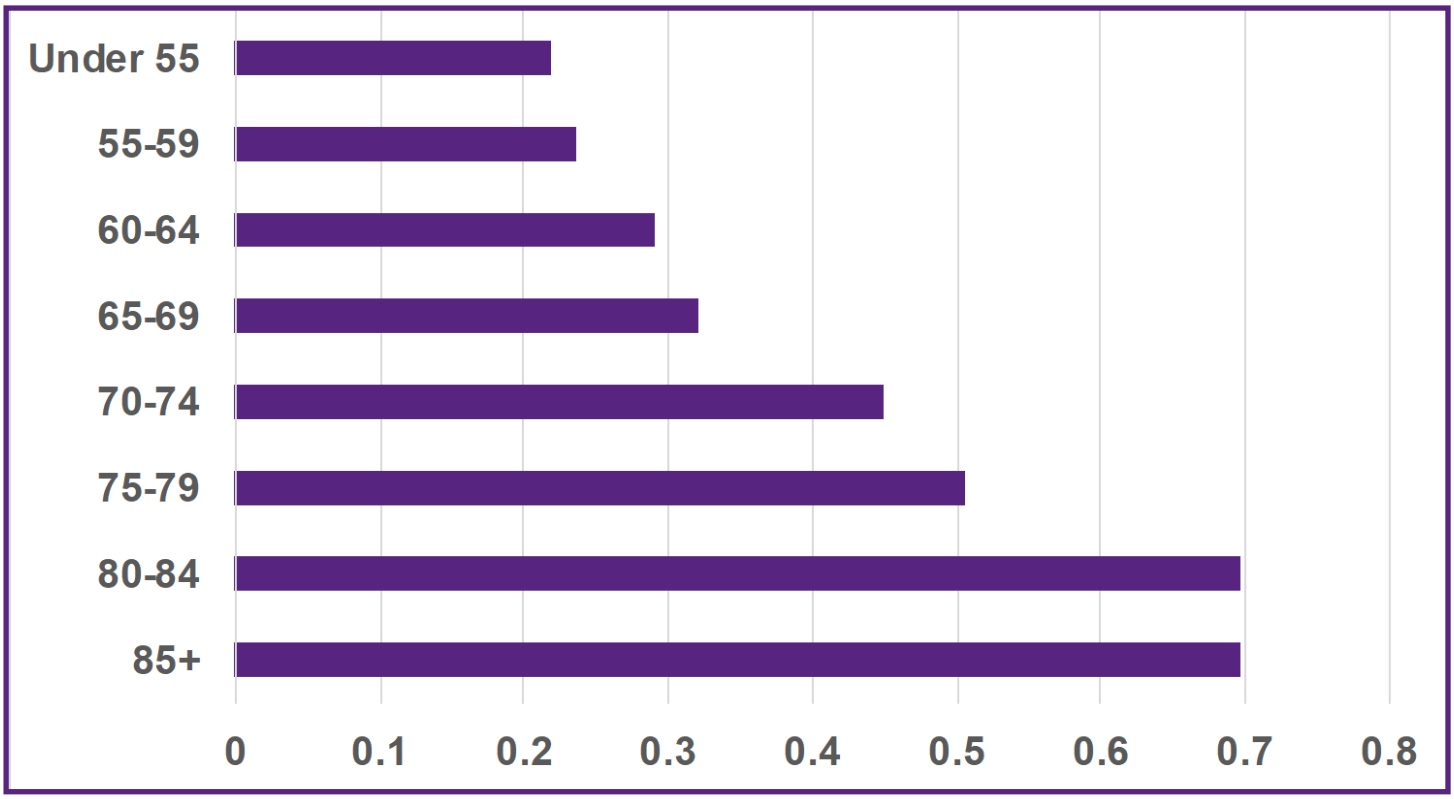

Table 2: Comparison of Selected Results of 2014-2022 Surveys

	70+	Male/ Female	LBGTQ	Bachelors & above	Work/ looking	Relocation 9 years	Smart phone	Little/no Social Media use
2014 (8)	51.8	0.425		87.7	19.2		47.5	52.6
2016 (12)	59.2	0.446		89.7	15.4	26.9	75.7	
2018 (14)	63.6	0.455	3.4	90.5	14.2	27.4	84.9	38.9
2020 (14)	68.6	0.454	3.5	91.8	12.8	27.9	89.8	35.8
2022 (15)	73.5	0.463	3.1	91.2	11.7	27.8	92.5	36.3

Table 3: Non-White Participants in 2020 and 2022 *(percent of participants)*

	Percent of survey participants					2020 Census	
RACE	**2016**	**2018**	**2020**	**2022**	**Ave.**	**60 up/BS up**	**65 up/BS up**
Black/African Am.	2.7	2.9	2.7	3.5	2.9	7.6	6.9
Hispanic/Latino	0.7	1.8	1.3	1.3	1.3	5	5
Asian	0.8	0.6	0.7	1	0.8	7	7
Native Hawaiian /Pacific Islander	<0.1	<0.1	0	0.1	0.3		
American Indian /Alaskan Native	0.1	0.3	0.1	0.1	0.2		
Two or more	1	1.4	1.3	0.8	1.1		
Other	1	0.1	0	0	0.3		
Total Non-White	6.2	7	6.1	6.7	6.5	15.5	14.4

Figure 3: Education Level of 2022 Survey Participants *(percent)*

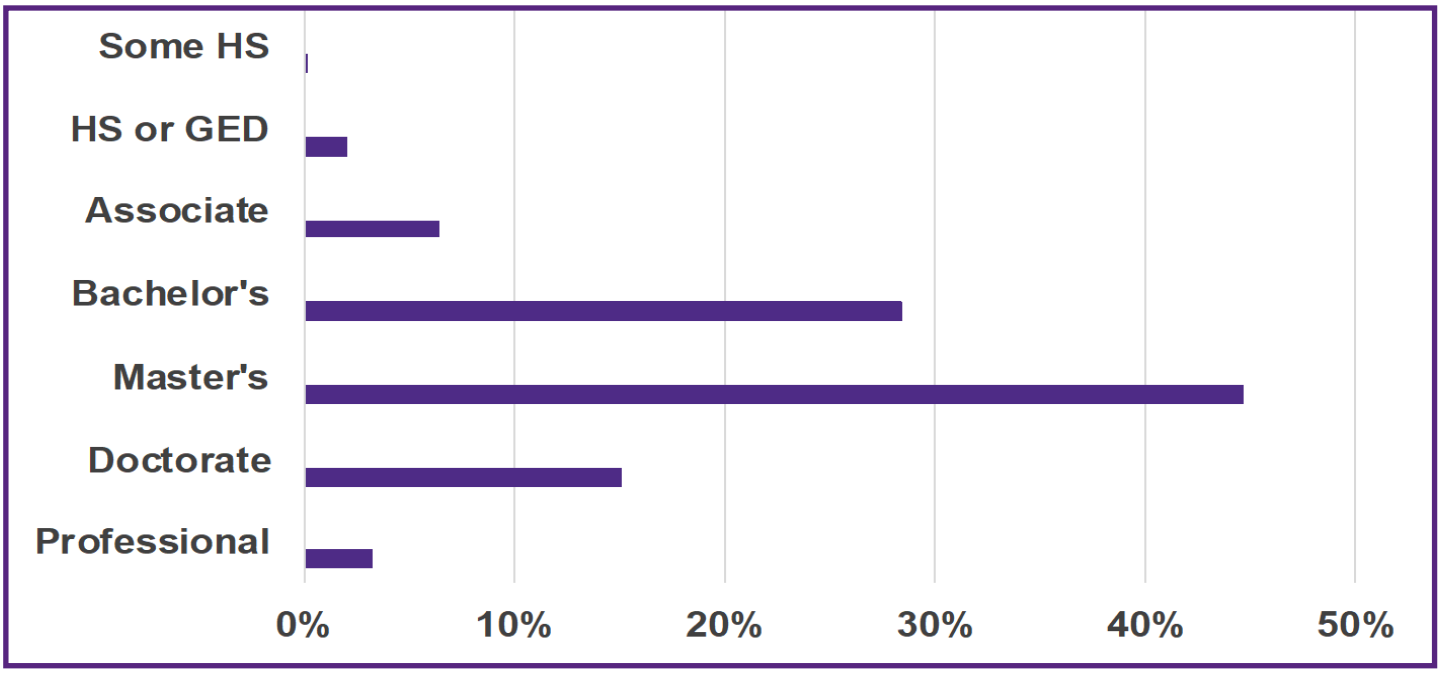

Figure 4: Topic Preferences of Younger and Older Survey Participants (2022 and 2020) *(percent of participants)*

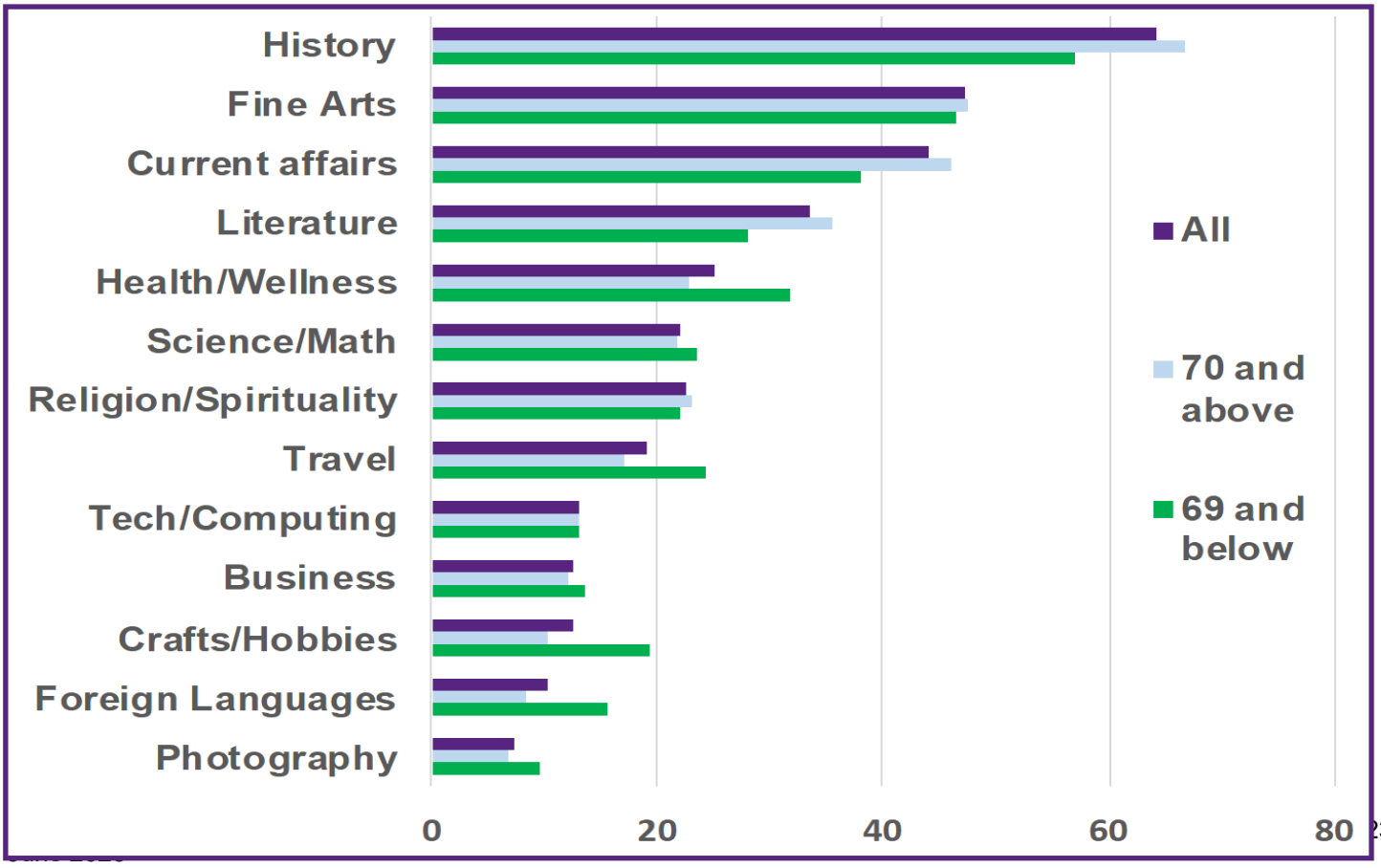

Table 4: Preferred Learning Modality Perceptions of Reasons for Online/Hybrid Learning and Challenges of In-Person Learning

Preferred Format	Reasons for Online Participation		Challenges to In-Person		
	Sched. Flexibility	Transportation	Time	Transportation	COVID
Online/hybrid	62.6	45.5	23.5	17.7	30.4
In Person	27.2	9.6	9.1	3.5	8.6

Table 5: Sources of Self-worth/Significance *(percent of participants)*

	Care giving	Intellectual Growth	Creative Growth	Family	Finances	Friends	Prof. Accom.	Spiritual Growth	Volunteer 2nd Career
All	6.0	71.0	31.7	61.4	27.3	65.9	10.4	22.1	33.7
70 +	**5.4**	**71.9**	**29.2**	**62.4**	27.0	**66.8**	10.2	21.8	**32.1**
69&down	**7.6**	**68.7**	**35.6**	**58.9**	28.2	**63.4**	10.8	23.0	**38.2**
Female	6.2	71.6	**32.3**	61.9	**24.1**	**70.4**	**8.8**	**24.0**	34.5
Male	5.5	69.9	**27.8**	60.5	**34.1**	**56.1**	**13.8**	**18.0**	32.1
MS & up	5.5	**72.1**	31.4	60.5	**25.9**	**63.9**	**12.6**	**21.0**	**35.4**
BS & down	6.3	**69.4**	30.1	63.0	**29.7**	**69.5**	**6.5**	**23.9**	**30.8**

Table 6: Comparison of Selected Characteristics of Individual Programs with Averages for all Survey Participants

	Age (70 +)	Gender (female)	LBGTQ	Race (white)	Education (BS up)	Prefer In-Person
Low	56.8	59.6	0.7	6.84	83.6	29.3
High	82.1	90.4	9.9	96.2	96.7	82.9
All	73.5	68.4	3.05	91.8	91.2	55.2