# INFORMATION TO USERS

This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.

**The quality of this reproduction is dependent upon the quality of the copy submitted.** Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.

In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.

Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps.

Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.

Bell & Howell Information and Learning
300 North Zeeb Road, Ann Arbor, MI 48106-1346 USA

UMI®
800-521-0600

# A Study of Educational-Travel and Older Adult Learners: Participant Types and Program Choices

A thesis submitted to the
Faculty of Graduate Studies and Research
in partial fulfilment of the requirements for the degree of
Doctor of Philosophy

Administration and Policy Studies in Education
Faculty of Education
McGill University
Montréal, QC, Canada

# ABSTRACT

This exploratory study identified 18 factors influencing the choice of an educational-travel program and refined a typology of the older adult educational-travel participant. A mail questionnaire queried 963 Canadian and American participants, aged 45 to 92 years, who had enrolled in a fall 1997 Elderhostel Canada program, but not yet attended. The number of useable surveys was 811, representing an 84.2% rate of return. The analysis employed descriptive statistics, correlation, factor analysis, step-wise regression analysis, analysis of variance, and content analysis.

Five participant types were identified in this study: the Explorer, Activity-Oriented, Content-Committed, Convenience-Oriented, and Opportunist. Sixty-three percent of the population could be assigned to one of these categories; 22% were assigned to a combination of two categories; and 15% of the study population did not fit this typology. The two dominant participant types were the Activity-Oriented and the Explorer.

This study revealed 18 factors that influence the program choice of older adult educational-travel participants: Social, Comfort, Location, Attend alone, Attend Accompanied, Activity, Information, Cost, Program, Personal Limitations, Escape, Travel, Organizational Attributes, Accessibility, Previous Experience, Dates, Seasonal Influence, and Work. Using step-wise regression analysis, the program choice factors that best discriminated the various participant types were the Activity, Program, Location, Personal Limitations, Accessibility, and Organizational Attributes factors. An analysis of the mean scores revealed that six factors had the greatest influence on program choice: Organizational Attributes, Location, Program, Attending Accompanied, Social and Comfort.

# RÉSUMÉ

Cette étude exploratoire a identifié 18 facteurs influençant le choix d'un programme d'éducation-voyage et a raffiné la typologie de participants adultes plus âgés au programme d'éducation-voyage. Un questionnaire envoyé par la poste, a permis d'interroger 963 participants canadiens et américains âgés de 45 à 92 ans. Ces participants avaient déjà adhéré au programme « d'Helderhostel Canada » à l'automne 1997, mais n'y avaient pas encore participé. Des 963 questionnaires envoyés, huit cent onze étaient utilisables, représentant donc un retour de 84,2%. L'analyse globale a employé les méthodes d'évaluation suivantes:les statistiques descriptives, les corrélations, les analyses factorielles, les analyses de régression « step-wise », les analyses de variance et les analyses de contenu.

Cinq groupes de participants furent identifiés dans cette étude: les explorateurs, ceux orientés vers les activités, ceux dévoués au contenu, ceux orientés vers l'agrément et les opportunistes. Soixante-trois pour-cent de la population cible peut être identifiée à l'une de ces catégories; 22% des participants s'identifient à une combinaison de deux catégories, et 15% de la population étudiée ne cadre pas dans les paramètres de cette typologie. Les deux groupes de participants les plus importants sont les explorateurs et ceux orientés vers les activités.

Cette étude a également identifié 18 facteurs pouvant influencer le choix de participants plus âgés à un programme d'éducation-voyage: le social, le confort, la location, la participation seule, la participation accompagnée, l'activité, l'information, le coût, le programme, les limitations, l'évasion, le voyage, les attributs organisationnels, l'accessibilité, l'expérience antécédente, les dates, l'influence saisonnière et le travail. En utilisant l'analyse de régression « step-wise », il fut possible de cerner adéquatement les différents groupes de participants grâce aux facteurs suivants: l'activité, le programme, la location, les limitations, l'accessibilité et les attributs organisationnels. Une analyse des pointages moyens obtenus a permis de déceler les six facteurs ayant la plus grande influence sur le choix du programme: les attributs organisationnels, la location, le programme, la participation accompagnée, le social et le confort.

# ACKNOWLEDGEMENTS

This document symbolizes a journey travelled along the path of lifelong learning that has altered the way I think, read, assess, interpret, query, analyze information, and share knowledge. The most important lesson I have learned is that research is a process, one that is continuously enriched by people and events along the way. I could not have reached this stage without the support and encouragement of so many people, in particular: Drs. Gary Anderson, Randy Swedburg, Lynn Butler-Kisber and Charles Lusthaus (my doctoral committee), the people at ELDERHOSTEL Canada (my sponsor), my friends and most importantly, my family.

To Gary: You have taken me on the most wonderful learning adventure of my life. As my mentor, you have done it all – provided challenge, vision, leadership, and support while at the same time respecting my priorities in life and guiding me into the future. Under your supervision I have been challenged to achieve my personal best. Beyond the endless hours of excellent tutoring, I thank you for your patience, confidence in my abilities, but most of all your friendship and unique sense of humour.

To Randy: From the petals of the rose to the snowball of knowledge, you will probably never know the impact that your analogies have had on my thinking. You have been with me since the beginning, always caring, always sharing. With you on my team, I had the best *McCordia* could offer. Thanks to you, I have learned that it is possible to unite my love for education, leisure, and travel.

To ELDERHOSTEL Canada: It has been my privilege to work with such an exceptional organization and I thank you for sponsoring my graduate research. I owe a debt of gratitude to the many staff and volunteers who have helped me along the way. In particular I extend my sincere thanks to Executive Director, Bob Williston; Program Director, Susan Adamson; and Regional Coordinator Judy Swedburg. Thank you for your encouragement and friendship, you have all made a valuable contribution to my graduate learning experience.

To Lynn and Charles: You have been there for me when I needed guidance, support, and advice. Most importantly however, you have taught me the value of alternative perspectives and how to defend the many choices that must be made throughout the research process. Thank you for the opportunity to practice a skill that will last a lifetime.

To my most outstanding professors: A special thanks to Dr. Mark Searle (Arizona State University, Jack Harper (University of Manitoba) whose influence during my undergraduate years remains with me today. To Dr. Geoff Isherwood (McGill) who planted the seeds that led to this degree during my first term as an MA student and to Dr. Cynthia Weston (McGill) who taught me about the powerful and lasting impact a professor can have on a student. Thank you.

To Johanne: Thanks for your skilled data entry, formatting, and graphics, you're the best. You have taught me more about software in one year than most people learn in a lifetime.

To my friends Anne, Michelle and the "Girls of Duggan House": Thanks for the laughs, the sanity breaks, and the good times.

To my family: You have shared in my joys and lived through my frustrations. To my parents, thanks for the energy, the work ethic, your words of encouragement, and believing in me! To my cherubs, Luc-Antoine and Marc-Alain, your smiles, laughter, and fantastic hugs provided the much-needed balance in my life while studying full-time. And to my husband Paul, who has helped in so many ways, you're the best! You've championed my cause, kept me moving when I wanted to slow down, and created an environment filled with unlimited, unconditional support. One of life's many challenges is learning how to set and achieve personal goals. I hope when we look back on the McGill years, they will be remembered as a time when we, as a family, learned the importance of dedication, hard work, perseverance, and family support.

And last but not least, to Up With People, thanks for the music!

# TABLE OF CONTENTS

# LIST OF TABLES

# LIST OF FIGURES

# CHAPTER I: INTRODUCTION

## 1.1 Introduction

The next century will embrace a new kind of older adult, one who is healthier, better educated, and more financially secure (Jean, 1994; Martin & Preston, 1994). Antiquated views of retirement, as a time of limited activity and dependency are eroding and being replaced with a new paradigm of ageing, one which accepts and embraces vibrant, active seniors who want to remain politically active, contribute to society, travel, learn, and lead active lives (Arsenault, Williston, Swedburg, & Anderson, 1997; Live It Up, 1993). This new paradigm of 'resourceful ageing' will bring with it a demand for programs and services that cater to older adults in ways yet unknown (Harootyan, 1991). Today's older adults are different from yesterday's, and tomorrow's older adults are yet to be defined. However, we do know that society is being forced to fundamentally redefine later life as the needs, interests, and expectations of older adults' change.

Seniors today have more formal education than their parents, and the next generation of retirees – the Baby Boomers – will be better educated than today's older adult population (Statistics Canada, 1997a; U.S. Bureau of the Census, 1996a). Since past participation in adult education lends itself to future participation in learning activities (Cross, 1981, 1992, Houle, 1961, Merriam & Caffarella, 1991), the future bodes well for innovative educational programming that responds to the needs and interests of older adults today, the Baby Boomers tomorrow. The U.S. Bureau of the Census (1996a) predicts that the traditional focus on youth will slowly begin to shift. In fact, educational programming for older adults may just be coming of age given the emerging demographic profile of today's older adults.

It is not only the demographic profile of the older adult that is changing. Throughout this century the structured learning opportunities for retired people have expanded, particularly in the category of non-formal educational programs. Non-credit programs, designed to meet the specific needs of niche markets, are being developed because no single program or educational approach will meet the needs of all older adults (Clough, 1992b). Formal learning in a highly structured, classroom environment, complete with exams and homework, will appeal only to one segment of older adults learners, whereas self-directed and non-formal learning activities, sponsored by a variety of community agencies and educational institutions will appeal to others

(Clough, 1992b). Learning in retirement, for many, will become a form of leisure, an opportunity for self-fulfilment, a time for intellectual enrichment or an opportunity to socialize with people who enjoy a specific topic or level of discourse.

As a society we have moved from viewing education as a way to prepare for life to accepting it as an ongoing part of life (Selman & Dampier, 1991). Today,

> Lifelong learning is not a privilege or a right; it is simply a necessity for anyone, young or old, who must live with the escalating pace of change – in the family, on the job, in the community and in the world-wide society. (Cross, 1992, p. xxi)

This shift to a lifelong learning society brings with it a lifetime of educational choices. Today's adult population differs from previous generations by the sheer volume and diversity of the learning opportunities that are available to choose from. Formal and non-formal educational programs are offered by a variety of organizations. The choice is tremendous and includes everything from learn-to-sew classes at a fabric store, kayaking lessons offered by the city recreation department, financial planning sessions at the bank, Internet workshops at a post-secondary institution, and educational-travel programs offered by various providers.

Organizations such as Elderhostel, Institutes for Learning in Retirement and the University of the Third Age have realized that educational programs for older adults fulfil a specific purpose within the myriad of educational programs available today. These organizations have reached out and successfully met the needs of niche markets of older adult learners. Yet despite the success of these pioneer organizations, there is emerging evidence of a need for increased understanding and program alternatives for older adults (Thornton, 1992).

Foot (1996) recommends that professionals, at all levels of the education system, recognize the inevitability of the population shift and prepare for the future ahead; a future that will have the largest population of mature adults in the history of humanity. Foot writes that the number of educational programs, targeted towards older adults, will continue to increase as society finds ways to help the burgeoning population of elders adjust to retirement, cope with the challenges of ageing, and fulfil a leisure need. He criticizes the Canadian education system for not paying attention to population demographics and claims that this has inflicted a financial cost upon the nation.

Accepting the demographic realities can be one of the most powerful tools available for understanding the past and forecasting the future, because demographic trends are predictable, not volatile. Foot cautions, that because of the slowed growth in the traditional full-time student

population (aged 19 to 24), post secondary institutions will have to become "more responsive and flexible to meet the changing needs of their clientele" (Foot, 1996. p. 157). Highlighting York University's Management Training Centre, which offers two and three day high priced courses (approx. $900) to executives needing a quick burst of information, Foot argues in favour of adapting and catering programs to specialized markets with unique educational needs.

As educational organizations begin to understand and cater to the learning needs of older adults, and ultimately compete for these learners to spend a portion of their disposable retirement income on educational programs, it will be important to remember that the context has changed. The sheer volume and diversity of the learning opportunities available, from multiple providers, means that motivated learners have a tremendous amount of choice when selecting formal and non-formal educational programs.

Older adults are also informed consumers and have the time to 'shop around' (Moschis, 1992) and will look for the best educational experience their money can buy (Bodger, 1994). This means, that it is imperative for organizations to understand the learning needs of older adults and the benefits they seek if they are to successfully develop and market programs for older adults. More importantly, this understanding is critical to retaining these people and ensuring they wish to enrol in the future.

The older adult program Foot profiles is Elderhostel, a one-week residential educational-travel program that caters to people aged 50+ with a desire to learn for pleasure and enlightenment. Of Elderhostel he states:

> This sort of education can only get more popular, especially after the turn of the century. These mature students may not care whether they get a degree, a diploma, or even a credit. However, they can afford the time and money to go on an archaeological dig or a museum tour. They will pay for the chance to work all day looking for dinosaur bones. This kind of education can become an important source of funding for institutions experiencing declines in government support. (Foot, 1996, p. 159)

Elderhostel offers people who are retired, or nearing retirement, the opportunity to enrol in short term study programs, at a location away from their usual place of residence and to learn about a topic or set of topics offered by the host institutions. Taught by qualified educators, this particular program attracts participants who are typically defined as being financially secure and having an above average level of education when compared to others in their age cohort (Mills, 1993).

When founders Marty Knowlton and David Bianco created Elderhostel, it was in part to combat the negative stereotype associated with ageing in North America, however they also saw merit in combining intellectual activity and travel into a meaningful experience for older adults (Knowlton, 1977). Since 1975, when it began with a small group of 220 older adult learners enrolled in five programs in New Hampshire, Elderhostel has grown exponentially. In 1997, the organization served 310,000 older adult learners (primarily North Americans) in programs hosted in 70 countries, through a network of 2000 educational and cultural sites (Elderhostel Inc., 1998b), testimony to the attractiveness of educational-travel for older adults.

This study is about the types of older adult learners who enrol in an educational-travel program and they choices they make. Central to this study and decades of adult education researchers is Cyril Houle's tripartite typology of adult learners. In his book, *The Inquiring Mind* (1961) he wrote,

> If we are to ever understand the total phenomenon of continuing education, we must begin by understanding the nature, the beliefs, and the actions of those who take part to the highest degree. (Houle, 1961, p. 10)

Knowing Elderhostel had a long history of providing high-quality educational-travel programs to older adult learners, combined with the fact they enjoy a high return rate with their participants, Elderhostel was selected as the target population for this study.

## 1.2 The Purpose of the Study

The purpose of this study was to gain a deeper understanding of older adults who enrol in an educational-travel program. At present there is a lack of academic literature and research on educational-travel (Li-Liuan, 1997; Pearman, 1997). Therefore, this investigation began by examining the literature to: (1) understand the social context that led to the emergence of educational-travel for older adults, (2) compare motivations for adults and older adults to engage in educational programs and pleasure travel activities, and (3) examine the similarities and differences between three parti cipant typologies that describe the adult learner, the international tourist, and the educational-travel participant.

The research questions for this exploratory study focused on three objectives. First, this study examined if the types of participants described in previous research adequately described the older adult educational-travel participant. Second, this study identified the factors that influ-

ence the choice of an educational-travel program, based on the existing adult education and pleasure travel participation research. Finally, this study examined the relationships between the factors influencing program choice, the types of participants, and four demographic characteristics: gender, nationality, new versus return participants, and attending the program alone versus enrolling with a companion.

## 1.3 Educational-Travel

Throughout the lifecycle there is need to learn and a need to travel. As humans we spend our entire lives learning. In the womb an infant learns to recognize the sound of her or his mother's voice. At birth, all the senses of a child are challenged as he or she learns to adjust to the world into which he was born. From the cradle to the grave, a continuous stream of needs and opportunities inspire and require people to increase their knowledge or skill base and there are many ways to learn (Selman & Dampier, 1991). Informal learning, the unstructured day to day way to acquire knowledge, is one type of learning. Alternatively we learn by engaging in a self-directed learning experience, or participating in formal and non-formal educational programs.

Humans also spend their lives travelling. An infant learns to crawl, then walk, so that he or she may travel from point A to B. Then, as the child matures he learns to ride a bicycle, or take a bus so that he can travel to school. In many parts of the industrialized world, people learn how to drive a motorized vehicle and this enables them to travel to work, to a vacation destination or to visit family. The need to travel spans the lifecycle, and like learning, travel can be a self-directed experience, or a highly planned, organized activity.

To some people, education and travel activities are independent experiences. Participants enrol in formal and continuing education courses for a plethora of reasons such as personal enrichment, career advancement, to meet new people (Boshier, 1971, 1991; Houle, 1961; Merriam & Caffarella, 1991; Morstain & Smart, 1974; Romaniuk & Romaniuk, 1982). Pleasure travellers take vacations to escape, relax, and visit family, friends or new places and to enjoy unique experiences (Crompton, 1979; Fisher & Price, 1991; Muller, 1994; Shoemaker, 1989; Vandersluis, Modden, & Maguire, 1994). There are however, people who enjoy combining their learning and travel experiences, they are educational-travellers.

Uniting education and travel into a single experience is not new. "Starting near the end of the sixteenth century, education was one of the main reasons for travelling ... and foreign

travel was an integral part of an aristocrat's education (Anderson, 1989, p. 19). During the Renaissance, the sons of well-to-do citizens embarked on educational journeys that lasted one to five years. This was known as the *Grand Tour.* Young aristocrats would tour, with an entourage of servants, led by a tutor – often a university professor – who served as a guide, educator and mentor (McCourt, 1989). By the 18th century, infrastructures (i.e. hotels) to support the *Grand Tour* existed all over Europe. Educational-travel became more manageable, however it remained a privilege of the elite (Anderson, 1989). During the latter part of the 18th century and early 19th century, when the French Revolution and Napoleonic conflicts were taking place, the *Grand Tour* ceased because of the danger and difficulty travelling.

In the 1800s, steam engines were introduced, engineering advances enabled roadways to reach into areas previously inaccessible, plus the time and cost of travel was reduced. As time passed, cars were introduced and by the 1920s commercial airlines appeared in Europe and the USA. The opportunities to travel and learn expanded tremendously in the 20th century and mass tourism, as it is known today, emerged (McCourt, 1989). As the 21st century approaches, travel is no longer a privilege of the elite. People of different social classes, professional affiliations, and socio-economic backgrounds enjoy a wide range of travel opportunities (Arsenault, Swedburg, & Williston, 1997). In modern-day prosperous societies, one of the reasons people travel is for intellectual enrichment (Slattery, 1989).

Educational-travel combines the attributes of learning and travel into a single experience. People, who travel with learning as their primary motive, are educational-travellers. Throughout the 20th century, the opportunities to enjoy learning through travel have evolved to a point where participants can choose to embark on a self-directed educational-travel experience, or enrol in specially designed programs available through educational institutions, not-for-profit organizations, or private business.

Self-directed educational-travel is similar to self-directed learning; it is a highly independent and an autonomous experience. To illustrate, consider the educational-travel experience of the Canadian philosophy professor who taught one summer in West Germany. Dr. Mac arrived with a commitment to teach his two summer courses, but all his spare time was spent fulfilling a passion he had held for years, to study Roman history in Europe. To accomplish this goal, he purchased a Eurail pass, maps of central Europe and England, acquired books on Roman history, identified pertinent museums, and sought advice from history professors at the universities of Freiburg (Germany) and Strasbourg (France). Armed with self-study information,

Dr. Mac set out alone, every extended weekend (he taught Monday to Wednesday) to find villages where the Romans had settled and walk the paths the Romans had travelled, visiting *enroute*, famous sites, such as Hadrians Wall. Dr. Mac was an educational-traveller, who like the independent study student, was willing, able, and enjoyed a self-directed experience.

While many may share Dr. Mac's passion for learning about the Romans in Europe, not all would be comfortable, nor have the interest or ability, to organize and plan such an independent self study-tour. For the majority, the comfort and convenience of pre-planned, structured, educational-travel programs, provide the opportunity to travel and learn within, what tourism sociologist Eric Cohen (1972) describes as, an **environmental bubble**; a protective shell that permits participant to experience people, places and cultures, within protective, familiar walls.

A variety of educational-travel programs exist today that meet the needs of different groups of people. Up With People, for example, is an independent, not-for-profit educational organization that attracts young adults (18 to 25 years) from around the world. The purpose of their program is to build understanding and Cupertino among people of different cultures through participation in a global travel-learning experience (Up With People, 1998). This program which began in 1965, continues to thrive today. Over the past 38 years, Up With People has united 16,500 students from 90 countries with thousands of host families around the world, for the participants stay in the homes of local people wherever they travel.

Reaching a different segment of the population, TraveLearn (1998) offers two to three week programs to adults (30 to 80 years) the opportunity to travel to a particular destination. Similar to Elderhostel, participants attend lectures, seminars, and field trips that are taught with a high quality, local resource specialist. Now in its 21st year of option TraveLearn, which promotes small group learning, is networked with over 300 colleges and universities around the world. Whereas Elderhostel was designed to be a low-cost program that uses modest, yet comfortable facilities, TraveLearn participants pay for first class travel and accommodations with their educational-travel program.

Study tours, another form of educational-travel, have been used by educational organizations to reinforce academic learning (Li-Jiuan, 1997). Bodger (1997), at the University of Nottingham, writes that travelling to a destination, with a group of people who share a common learning interest, enables participants to enjoy intellectual companionship while being immersed

in a topic of study. Today, universities and colleges around the world offer educational tours and study breaks to students of all ages (i.e. University of Nottingham, 1997; University of Texas, 1998).

These educational-travel programs, which have emerged since the mid 1960s have grown in size and popularity over the years. Whether the educational-travel program is offered through a not-for-profit organization (Up With People, Elderhostel), commercial organization (TraveLearn) or an educational institution (university or college), educational-travel programs are being designed and offered to various segments of the population. But what is an educational-travel program? A review of the literature revealed that there was no definition of this type of program, so the following was constructed:

> An educational-travel program is a pre-organized, structured learning activity, taught by a knowledgeable resource specialist, that requires participants to travel to, and stay at, one or more destinations away from their usual place of residence for a specified period of time.

This definition deliberately attempts to differentiate an educational-travel program from the less formal travel-learning opportunities that take the form of a guided museum tour or a city bus tour. While one could argue that a bus tour is educational, these short-term, day programs, are better categorized as tourist activities with a learning component; a complement to other travel activities rather than the *raison d'être.* The focus of this study is on an educational-travel program.

A critical component of this definition is the fact that educational-travel programs involve at least one-overnight stay at a location away from home. Like the *Grand Tour* though, participants may also remain in the program over an extended period of time (i.e. Up With People). Programs that enable adults to enjoy an educational-travel experience are particularly appealing in retirement, when older adults can combine learning, leisure and social interaction into a single experience (Morrison, 1994) or vicariously experience a profession on a short-term, non-threatening basis (Muller, 1994). When offering programs to older adult learners, it is imperative that the educator be very knowledgeable for the participants bring with them a life-time of experience, wisdom and in some cases, scholarship. In addition, the environment must be safe, socially welcoming (particularly for the single traveller), and the facilities comfortable (Arsenault, 1996).

Why examine educational-travel programs, particularly those aimed at older adults? The small but growing body of literature focused on educational-travel offers some insight to this question.

> Increasing affluence and more leisure time have contributed to the growth in international educational-travel in recent years... This growth in demand has been accompanied by a growth in educational institutions and organizations that are prepared to offer such travel through study-tours and similar specialist packages. (Bodger, 1994, p. 182)

Conter (1994), in his article, *Measuring the Economic Impact of Older Adult Education/Travel Expenditures*, wrote that,

> Education and hospitality industries, both service-intensive enterprises, have benefited through providing services to this growing market niche and, increasingly, the travel and educational related expenditures of this market segment are being viewed as an attractive source of supplemental revenue by educational institutions and travel professionals alike (p. 112).

Programs such as Elderhostel, Conter asserts, not only provide the participant with the educational-travel benefits they desire, but can result in significant economic impacts on the host community. In a recent study commissioned by Tourism Canada to examine the Canadian educational programs and learning vacations for older adults, the authors reported that:

> More and more older adults are finding meaningful use of their time through the pursuit of activities that combine leisure with an opportunity for education and social interaction. Through travel, people gain new knowledge about different parts of the world ... and travel activities provide opportunities for learning and self-enrichment. (Morrison, O'Learly, Heish, and Li, 1997, p. 67)

The Director for the Centre of Continuing Education at the University of Canterbury (New Zealand) writes that "despite the level of activity in the field of educational-travel and tourism, the volume of research is not substantial" (Pearman, 1997, p. 77). He points out that there is little original research that unites education and tourism, an observation that was made seven years earlier at the first Global Classroom Conference, a conference established in 1990 to promote the international exchange of individuals, organizations, institutions with an interest in educational-tourism. Four years ago, in the opening address of the Third International Conference on Educational-Tourism, Canada's Deputy Minister of Health wrote, that

> There is a crying need for research, one in which a vital role can be played by such organizations as seniors' universities, adult education services working with seniors, and organizations like Elderhostel. (Jean, 1994, p. 6)

Combine the lack of research on educational-travel (Pearman, 1997) with the limited research currently existing on older adult learners, (Thornton, 1992) and an exciting opportunity for a study emerges.

## 1.4 Contributions of the Study

This study makes three contributions to the fields of education, tourism, and leisure studies. First, this study presents a typology of older adult learners enrolled in an educational-travel program. This information, along with the factors influencing program choice, provides a base of information on which future researchers can further examine the educational-traveller participant. It also provides new information to people who develop, administer, and market educational-travel programs.

Contributing to the small but growing bodies of literature on older adult learners and educational-travel, this study synthesizes the literature related to older adult learners, pleasure travel, and educational-travel. The review of literature highlights how the research to date, particularly in adult education, has brought us to a point in time where the motivation, of certain participant groups, is well understood, but very little research exists that focuses on the factors influencing program choice.

Methodologically, this dissertation describes how qualitative and quantitative research methods can be used harmoniously, in exploratory research, to better understand educational program participants. The study concludes with an illustration of how an individual educational program can use information from a participant typology, along with the factors influencing program choice, to gain a deeper understanding of the people who are attracted to their specific program.

## 1.5 Definitions

Words can enhance meaning or cause confusion. As the purpose of this document is to communicate clearly and concisely the findings of this study, it is important to define relevant constructs that are used in this document.

**Adult education programs** are organized learning activities, of an external agent, that are designed to meet the needs of a specific group of adults (Selman & Dampier, 1991).

**Attributes** are the perceived or actual characteristics of program (e.g. educational-travel), product or service.

**Consumers, participants, or registrants** are terms used synonymously to describe the person who actively seeks, selects, and enrols in an educational program.

**Educational-tourism** refers to the institutions, organizations and industries and that provide the infrastructure, programs, and materials that support the educational-traveller.

**Educational-travel** refers to the range of highly structured to self-directed and autonomous activities that enable individuals to experiences the combined attributes of learning and travel.

**Educational-travellers** are people whose primary motive while travelling, is to learn.

**Educational-travel programs** are pre-organized, structured learning activities, taught by a knowledgeable resource specialist, that require participants travel to, and stay at, one or more destinations away from their usual place of residence for a specified period of time.

**Market segmentation** is the process of dividing the target market into smaller client groups so that that the needs may be matched more precisely (Crompton & Lamb, 1986).

**Older Adults**, for the purpose of this study, includes people who are retired or contemplating retirement and are typically aged 50 years and older.

**Pleasure travel** is the act of people taking trips to a place, or places, outside their home community for the purpose of pleasure (Lue, Crompton, & Fesenmaier, 1993).

**Target market** is a relatively homogeneous group of people or organizations that share similar preferences with an agency that seeks to serve them (Crompton & Lamb, 1986).

**Travel-learn** is a term that is often used interchangeably with educational-travel.

## 1.6 Summary and Organization of the Study

This dissertation is presented in five chapters. Chapter I introduced the topic, stated the purpose of the study, discussed educational-travel, and identified the contributions of the study. Chapter II presents the conceptual framework and examines the social context that has evolved to enable educational-travel to be a viable program option for select target markets. Typologies of the adult education and pleasure traveller are contrasted and select studies from the participation literature in both education and tourism are synthesized to illustrate the common benefits derived from an educational-travel program. The methodology is presented in Chapter III and the analysis in Chapter IV. Chapter V concludes with a discussion of the major findings and demonstrates the applied use of the research findings.

# CHAPTER II: REVIEW OF THE LITERATURE

## 2.1 Introduction

As the next millennium approaches, the media, demographers, and marketers are all sending a unified message, the demographic profile of the population is changing. The world's population is ageing at a rate unprecedented in history (Martin & Preston, 1994) and this will have an impact on many aspects of society, including education.

As the population of older adults increases, so does the need to develop programs, services, and products to meet their needs. Historically there has been little emphasis on the older adult learner because, when compared to adults aged 18 to 50, the 50+ or 65+ cohorts did not represent large markets for educational programs. And although the era of grey power is still 20 years away, when the Baby Boomers will have all reached retirement age, the proportion of the population over the age of 65 years' increases annually (Foot, 1996). In fact:

> The elderly population is the fastest growing age group world-wide. Persons aged 65 and over will increase more than twice as fast as the total population between 1996 and 2020. (U.S. Bureau of the Census, 1996b, p. 1)

This presents exciting opportunities for organizations interested in offering programs aimed at meeting the learning needs of older adults, for one very significant reason. Each generation reaching retirement is better educated than their predecessors and leading adult education researchers agree "the more education people have, the more education they want, and the more they participate in further learning activities" (Cross, 1992). If this remains true, with future cohorts of retirees, then the demand for educational programs by older adults will increase.

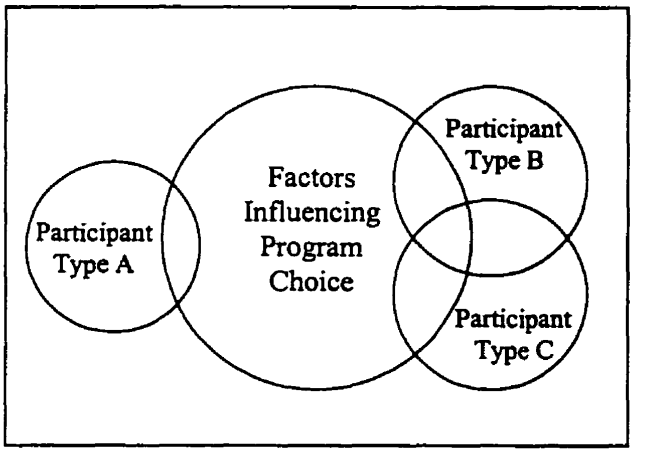
The purpose of this chapter is to present a conceptual framework for this study, describe the social context that has led to the emergence of educational-travel as a viable program option, and present the adult education, educational-gerontology, and pleasure-travel literature related to this inquiry. The reader will note that this literature review offers breadth rather than depth. The decision to report on the literature in this fashion was based on the fact that this was an exploratory study and there was a need to examine a variety of topics to begin to understand the educational-travel phenomena, particularly with older adults. Additionally, because the study of older adult learners and educational-travel is its infancy and the literature related to senior learners and retired pleasure travellers is limited.

## 2.2 The Conceptual Framework

The sustainability of any educational program ultimately hinges on participation. If there are no students, there is no need for a program. Attempting to understand the adult education participant has fascinated researchers, providers of educational services and educators for decades (Romaniuk & Romaniuk, 1982). Five decades of research, influenced strongly by the fields of psychology and behavioural psychology, has provided us with a wealth of information about the motivations of adult learners (Boshier, 1971, 1973, 1991; Boshier & Collins, 1985, Cross 1981, 1992; Darkenwald & Merriam, 1982; Havighurst, 1969, 1976; Henry & Basile, 1994; Houle, 1961, Knowles, 1989; Merriam & Cafarella, 1991; Morstain & Smart, 1974, Roberto & McGraw, 1990, Romaniuk & Romaniuk, 1982 Scanlan & Darkenwald, 1984). The contributions from these researchers has brought increased understanding about who, what, when, and where adults study. However the greatest emphasis has been on examining the motivational dynamic – why or why not adults chose to participate in formal and non-formal education programs. According to Boshier & Collins (1985), this interest in understanding motivation "stems from the almost universal desire to tailor program content and processes to the needs, motives and interests of learners" (p. 113).

Despite all that has been learned over the past few decades, organizations and institutions that offer programs to adult learners continue to grapple with a fundamental question "Why do some programs fail to attract registrants while others succeed?" (Arsenault, 1996). What is missing? Little is known about the factors influencing program choice and the types of learners attracted to the ever increasing and highly diverse range of non-formal educational programs. A great deal is known about the motivation to learn, but what factors impact the decision to translate the desire to learn into the consumer behaviour activities of seeking out information, evaluating options, and ultimately choosing to enrol in an educational program? The college choice literature has, to some degree has explored this question with young adults who are entering post-secondary education, but this research offers little relevant insight into the program choice factors related to adult learners in non-formal educational programs. This is particularly true for older adults, people who have typically completed their careers and have the time to participate in an educational program in retirement as a form of leisure or to help them cope with the transitions of later life.

**Figure 1 Conceptual Framework**




This study, which examines an educational-travel program for older adults, moves beyond trying to explain the motivation for older adults to learn; it focuses on understanding the factors influencing the choice of an educational-travel program and the types of people who are attracted to this type of learning. The study was informed using an inter-disciplinary approach; an approach that is increasingly being accepted as the boundaries between disciplines become ore permeable and the major intellectual, social, environmental and economic issues require disciplines to share theories and approaches (Social Sciences & Humanities Research Council of Canada, 1997). Conceptually, there were two main foci to this study (Figure 1). The first was to identify the factors influencing program choice and the different types of participants, the second was to determine which factors were of greatest importance to each participant type.

This study was an extension of the researcher's MA study that qualitatively explored how Elderhostel participants select a program. It was a national study that involved collecting data from 154 participants, aged 42 to 85 years, and consistent with Moustaka's five phases of phenomenological analysis, triangulated the data from 17 focus groups, 10 in-depth interviews, and a demographic questionnaire (Arsenault, 1996).

The choice of Elderhostel, as an educational venue, and the specific program choice were found to be influenced by 14 factors: location, travel, program, course content, accommodations, cost, dates, negotiation with travel partner, social, the program site, personal requirements, escape, information, and certain attributes of the organization. A participant typology also emerged and revealed six types of Elderhostelers:

1. The Activity-Oriented – people wanted only to register in programs that included some form of physical activity;
2. The Geographical Guru – people who select a program based on their desire to explore and learn about a particular area in the world; the location is critical;

3. The Experimenter – first time registrants who are assessing if the programs Elderhostel offers will meet their needs. Typically experimenters select a program near to their home, and to protect their personal comfort level, they lean towards programs with an activity component or one with a familiar content area;
4. The Adventurer – people who are looking for new experiences in learning and socializing and, as a result, are willing to go most anywhere and study almost any topic;
5. The Content-Committed – are willing to travel far and wide to find a program that will help them to expand on their knowledge of a particular subject area, the topic is critical; and
6. The Opportunist – people who enrol for reasons unrelated to the program.

The literature review of the MA study concentrated primarily on the adult education and motivation literature. To move the line of inquiry forward in the doctoral study, it was important to broaden the range of literature reviewed so that factors influencing the educational-traveller could be better understood. To this end, there are three major sections in this review of literature. The first examines the social context that has led to the emergence of educational-travel as a viable program option for older adults; the second section reviews three typologies, Houle's (1961) adult learner. The third section presents and synthesizes the factors related to participating in adult education and pleasure-travel activities. Finally, the chapter concludes with a brief review of two models of consumer behaviour that form the foundation for the researcher developing a model of the educational choice process.

## 2.3 The Social Context

The dawn of a new century has sparked a flurry of interest, anticipation, and speculation about what the future will hold. It's as if the year 2000 somehow symbolizes a turning point, a milestone, in the history of mankind. Anticipating the challenges and activities of the next century is, in many ways, like anticipating retirement. On one hand, it is a time for celebration, to establish goals and dreams for the future. On the other hand, it is a time for reflection; a time to look back to see how the activities of the past have shaped the events that will impact the future.

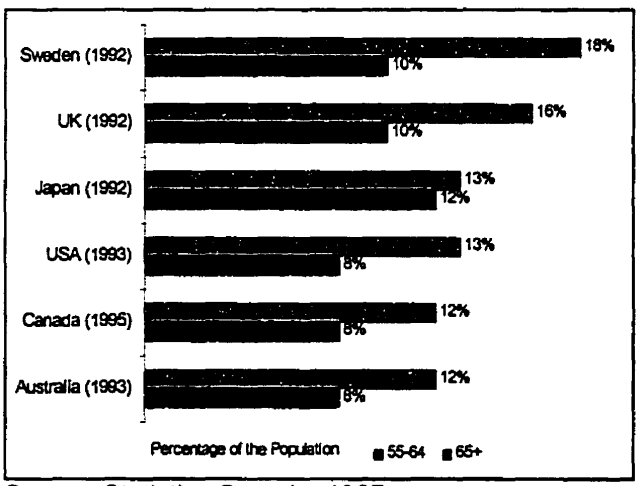
This section of the literature review canvasses the changes, which, during the past century, have created a context in which educational-travel has become a viable program option for older adults. Specifically, this section will present the demographics of an ageing population, discuss the concept of lifelong learning, review the program beginnings for older adult education, and highlight how changes in the roles of leisure and travel have led to an interest in educational-travel in retirement.

## 2.3.1 The Age of Ageing

By the year 2025 the United Nations anticipates that there will be 822 million people in the world aged 65 and over, a number that exceeds the present combined populations of Europe and North America (Martin & Preston, 1994). Already countries like Sweden and the United Kingdom have 28% and 26% of their populations aged 55 years and over (Figure 2).

This growth in the senior population can be largely attributed to decreased fertility and increased longevity (Foot, 1996; Martin & Preston, 1994; Moore & Rosenberg, 1997; Statistics Canada, 1997a; U.S. Bureau of the Census, 1995). Today, men and women in developed countries such as Japan, France and Italy, can expect to live 70 and 80 years respectively (United Nations, 1994). In North America today, the life expectancy at birth for Canadian women is 85 years, Canadian men 81, American women 79 years, American men 72 years (U.S. Bureau of the Census, 1996a; Statistics Canada, 1997a). The shift in the percent of senior citizens (defined by both the Canadian and United States governments as people 65 years and over) has increased dramatically throughout this century and will continue to do so for the first third of the next century (Moore & Rosenburg, 1997).

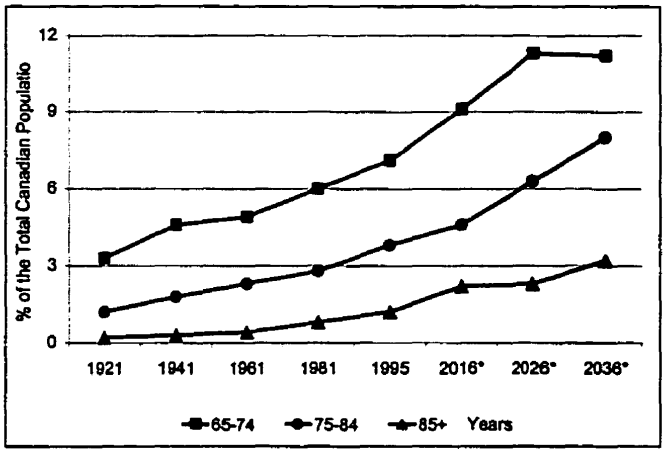
**Figure 2 World Population, Ages 55+**




Source: Statistics Canada, 1997a

In Canada, the 65+ population constitutes one of the fastest growing population segments. In the early 1900's, 5% of the Canadian population was aged 65+. If the demographics predictions are correct, by the year 2036 (Figure 3) the percent of the population aged 65+ will stretch to 22.6% (Statistics Canada, 1997b).

**Figure 3 Canadian Population in Age Groups, Projections and Actuals: 1921-2036**

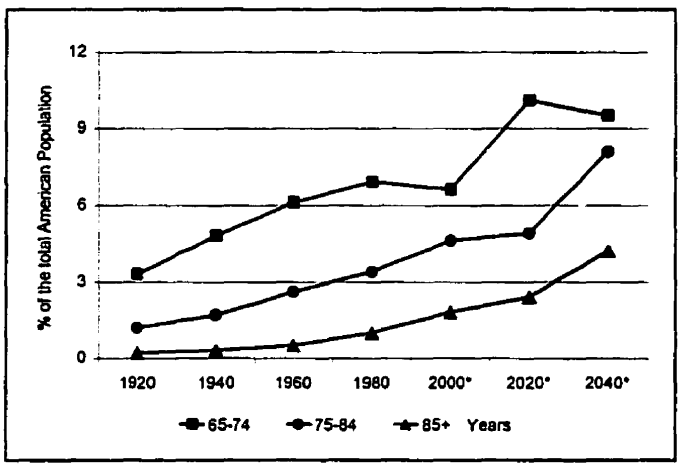



Source: Adapted from Statistics Canada (1997a) catalogues no. 89-519-XPE

Note *: Projections based on assumptions of medium population growth

The trend is similar in the United States (Figure 3) where the U.S. Bureau of the Census (1995) predicts that by the year 2050, 25% of the American population could be 65 years and older, up significantly from 4% in the early 1900's. By the middle of the next century, it might be completely inaccurate to think of United States Americans as a Nation of the young because there could be more senior citizens (65 or over) than young (14 or younger). Indeed demographers consistently report that the new elderly (people aged 85 years and older) are the fastest growing population of elders increasing 274% in numbers between 1960 and 1994 (Heil & Marks, 1991; Longino, 1994; U.S. Bureau of the Census, 1996a ).

**Figure 4 American Population in Age Groups, Projections and Actuals: 1920-2040**




Source: Adapted from the US Bureau of the Census 1996

Note *: Projections based on assumptions of medium population growth

The older adult population is not homogeneous. In fact, because they have had a lifetime of unique and distinct experiences, they differ greatly in their needs and wants (van Harssel, 1994). Demographers report a number of findings that bear remembering as educational organizations, businesses and not-for profit agencies develop programs and services to meet the needs

of the ever increasing population of older adults. While the range of items one could present is extensive, those, which are of greater relevance to educational-travel for older adults, have been highlighted in Table 1.

**Table 1 65+ Ageing Statistics for Canada and the USA**

| Canada | The United States of America |
|---|---|
| • Women represent 58% of the population over 65 years and 70% aged 85 and over | • Women represent 59% of the population over 65 years and 72% aged 85 and over |
| • 42% of women live with a spouse, compared to 74% of men | • 41% of women live with a spouse compared to 75% of men |
| • 38% of women 65+ live alone, increasing to 53% for women ages 85+ (male figure not available) | • 32% of women and 16% of men age 65+ live alone, these figures increase to 57% for women and 29% for men at age 85+ |
| • 48% of women 65+ have disabilities compared to 43% men | • 34% of women 65+ had a functional limitation compared to 22% of men, |
| • 38% of women 65+ are self employed compared to 61% of men | • 25% males and 16% females aged 65 - 69 work, 7% of men and 3% of women aged 75% work[1] |
| • 59% aged 65+ never completed high school | • 40% aged 65+ never completed high school |
| • 76% of people 65-74 years report their health as good, very good or excellent, 68% for those 75+ | • 75% of people 65-74 years report good health, compared to 67% aged 75+ |
| • In 1991, 26% of people aged 65+ were immigrants | • In 1994, 9 in 10 elderly were White, this will decrease to 8 in 10 by the year 2050 |
| • The % with incomes below Statistics Canada's Low Income Cut-Off has dropped from 34% in 1980 to 19% in 1994 | • 16% of women and 9% of men were living at or below the poverty level in 1992 |

Sources: Statistics Canada (1997a) and the U.S. Bureau of the Census (1996a).

[1] Figures for 65 to 69 years and 75+ available, the 70-74 figures were not reported.

This new demographic profile of older adults represents a fundamental change. Levy (1992) identified this important social phenomenon as the 'Age of Ageing'. A time where new cohorts of older adults will become pioneers and trend setters for a different future, one which includes a new cycle or work, leisure and education. Due to their sheer numbers, seniors will become a dominant force in society and challenge all sectors of society – private, government and not-for-profit – to develop programs and services to meet their needs.

### 2.3.2 The Role of Education and Lifelong Learning

Lifelong learning is a process. It is not a single event, but rather, a concept that defines the continuous learning throughout one's life. Lifelong learning encompasses all the formal, informal and non-formal learning a person does throughout their lifetime. Formal learning refers to the hierarchical, structured, chronological schooling systems that take a person from grade school through college, university or professional training (Ironside, 1989). Informal learning refers to the day to day learning, for example 'feeling the temperature outdoors' to know which coat to wear before leaving the house. It is a lifelong process that involves learning attitudes, values, skills, and knowledge from everyday life experiences. Non-formal learning is defined as "any organized educational activity outside of the established formal system – whether operating separately or as an important feature of some broader activity – that is intended to serve identifiable learning clienteles and learning objectives" (Ironside, 1989, p. 15).

Many adult-education researchers discuss the concept of lifelong learning (Cross, 1992; Havighurst, 1976; Manheimer, Snodgrass, & Moskow-McKenzie, 1995; Merriam & Caffarella, 1991; Ray, Harley, & Bayles, 1983; Selman & Dampier, 1991) however it is the description by Heil and Marks, this author prefers.

> Lifelong learning means continuing to stay involved in a changing world, enhancing one's knowledge of, and pleasure in life, [sic] and striving for a better understanding of the complex issues that confront us each day. (Heil & Marks, 1991, p. 47)

By engaging in lifelong educational activities, of which learning is the 'intended end-product' (Selman & Dampier, 1991), individuals become empowered by improving their individual capabilities and knowledge and are able to share this with others (Heil & Marks, 1991).

#### 2.3.2.1 The Evolution of Adult and Older Adult Education

In the United States, the emergence of adult educational opportunities dates back to the 1700's. In 1727, Benjamin Franklin "established one of the first adult education activities in the colonial United States, called Junto ... a weekly study group of twelve people who met to discuss community and social issues" (Manheimer et al., 1995). In Canada, organized adult learning existed as early as 1867 however the adult education movement only came into conscious existence between 1915 and 1937 (Selman & Dampier, 1991).

The impact of World War II had a significant influence on increasing the availability of adult education courses in North America (Selman & Dampier, 1991). Between 1940 and 1959 the learning needs of the population focused first upon supporting the war effort and later upon educating immigrants. It was at this time that a fundamental shift in the role of learning began to emerge. Until this point, the cultural bias had been towards education for youth (Manheimer et al., 1995).

Since the 1960s there has been a gradual acceptance that education is a lifelong process (Lengrand, 1989; Selman & Dampier, 1991). At the same time, the volume of research in adult education began to increase and educational-gerontology emerged as a complementary line of inquiry (Manheimer et al., 1995). Structured learning opportunities move from being seen as relevant only at certain times on ones life, to being accepted as part of a lifelong process; a process that taps multiple learning resources, formal and non-formal, as personal and societal needs arise (Cross, 1992).

The availability of, and interest in, education programs for older adults expanded rapidly during the 1970's. Since the early 1980's "hundreds of new educational programs have been launched for retirement-age people and a whole new generation of retirees has turned up on registration day for educational programs offered by colleges, universities, churches, synagogues, hospitals, libraries, senior centers, and even department stores" (Manheimer et al., 1995, p. 1).

What caused this surge of interest in older adult education? There are a number of factors that can be attributed to this phenomenon, including:

1. A changing demographic profile of people aged 55+ (Foot, 1996);
2. New attitudes towards resourceful ageing (Heil & Marks, 1991);
3. Embracing learning as a lifelong process (Cross, 1992);
4. Changing attitudes at universities and colleges (Queeney, 1995);
5. New generations of retirees, who reach retirement moderately affluent, well educated, with new expectations for their retirement years (Manheimer et al., 1995).

Together these factors help explain why the demand for educational programs that welcome the older adult learner, is increasing. This trend should continue as new generations of retirees look towards enrolling in educational programs that will enhance their social well being (Hiemstra,

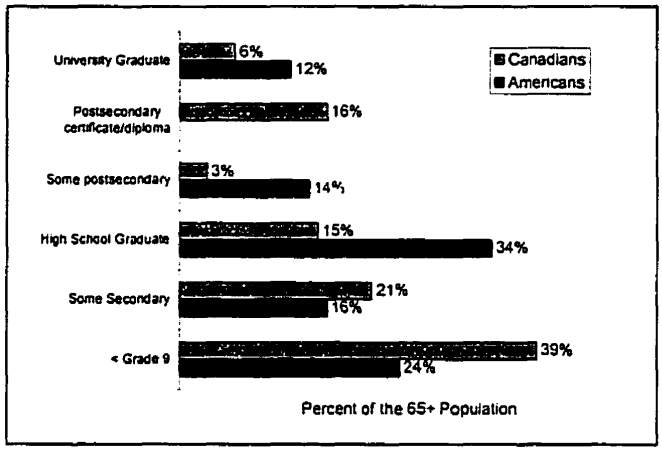
1972), help them adjust and cope with retirement (Havighurst, 1969), or enjoy learning as a form of leisure (Arsenault & Anderson, 1998).

Lifelong learning interests will not fade away because someone retires (Arsenault, 1996), on the contrary, the need for increased educational programs and services for mature adults should increase (Pearce, 1991). It is like reading a newspaper, drinking Coca-Cola, golfing or fishing, if you have enjoyed learning all your life, why stop in retirement?

### 2.3.2.2 Educational Statistics

The statistical evidence on adults aged 65+ in Canada and the USA reveals that the majority of older adults do not have a college or university degree, indeed many did not complete high school (Figure 5). The amount of higher education however correlates directly with age as Tables 2 and 3 illustrate. Younger cohorts of older adults are better educated then their predecessors; a trend that will continue with future generations of retirees.

**Figure 5 Educational Attainment of Older Adults**




Source: U.S. Bureau of the Census, 1996a; Statistics Canada, 1997

**Table 2 Educational Attainment of Canadians, 1995: Aged 65+ by Percent of Age Cohort**

| Age | Gender | < Grade 9 | High school/Trade Certificate/Diploma | Non University | Other University | University Graduate |
|---|---|---|---|---|---|---|
| 65-74 | Men | 35.6 | 37.2 | 12.9 | 5.0 | 8.3 |
| | Women | 36.0 | 42.4 | 13.4 | 5.0 | 3.3 |
| 75-84 | Men | 45.0 | 34.4 | 9.9 | 4.1 | 6.6 |
| | Women | 43.1 | 37.5 | 11.8 | 4.7 | 2.9 |
| 85+ | Men | 55.0 | 27.9 | 8.3 | 3.2 | 5.6 |
| | Women | 51.1 | 31.5 | 11.1 | 3.9 | 2.4 |

Source: Statistics Canada (1997a), Catalogue no. 89-519-XPE

**Table 3 Educational Attainment of Americans: Aged 65+ by Percent of Age Cohort**

| | < Grade 9 | 9 - 11th Grade | High School Graduate | Some College/ Associated Degree | Bachelors Degree or More |
|---|---|---|---|---|---|
| 65-69 | 17.6 | 15.4 | 38.0 | 14.8 | 14.2 |
| 70 – 74 | 20.4 | 15.1 | 36.8 | 15.7 | 12.0 |
| 75+ | 31.8 | 16.1 | 29.5 | 12.4 | 10.2 |

Source: U.S. Bureau of the Census (1996a)

What is interesting to note in Table 3 is that in each age cohort, men attained a higher level of education than women. This is because the "differences in educational attainment between men and women have historically been attributed at the college level" (U.S. Bureau of the Census, 1993). Today the Bureau reports that there is no longer a difference between the educational attainment of young men and women. In fact "the gaps between the education levels of women and men that were evident in the early 1970s have essentially disappeared for the younger generation" (Smith, 1995, p. 1).

Another changing feature in the education of women and men is that since the late 60's women's participation has increased almost four times as fast as the number of females in the population (Cross, 1992). Contributing to this phenomenon is the decline in traditional female roles, children entering school earlier and leaving later, increased divorce rates that cause women to enter the workforce, and technological advances that have liberated women by minimizing the time spent on activities such as laundry and dishes. Today, women are more likely to attend college and graduate with a post-secondary degree. What, if any, impact these gender shifts in education will have on older adult education programming 30 or 40 years from now is yet unknown, but a worthy topic for future research.

People's values are shaped by their life experiences and societal influences, the fact that learning has become a way of life for segments of the population implies a bright future for organizations who wish to provide educational programs to select target markets (Muller, 1994). One of those life experiences is participating in formal and non-formal learning programs. Leading adult education researchers agree that the more education a person has, the more they want (Cross, 1992; Merriam & Caffarella, 1991; Selman & Dampier, 1991). What is critical to remember however, is that the learning needs of older adults are different than people entering, changing, or sustaining a career. The largest percent of older adult are involved in non-formal,

not-for-credit education programs and their learning goals differ, their strengths and weaknesses change, and they have different transportation, scheduling, and personal comfort issues to contend with (Manheimer et al., 1995).

Finding new opportunities to learn in retirement will be important for all people, not just those who have the disposable income available to enrol in programs for leisure purposes, self-fulfilment or personal growth (Heil & Marks, 1991). A full range of learning options must be available to meet the ever changing and highly diverse needs of a heterogeneous older adult community that is comprised of people who live with different physical, mental, social, and economic situations. Researchers must also broaden their study population, beyond those offered by educational institutions, and begin to examine the learning needs of older adults who enrolled in the full range of adult education programs available at the community level.

#### 2.3.2.3 Older Adult Education Programs

Older adults are unique in that they bring a wealth of knowledge to every learning environment. Described as demanding and highly informed consumers, each generation of older adults is more mentally fit then their parents (Muller, 1994). Today's elders represent a highly diverse group of individuals who are at various stages of psychological, physical and social ageing (Moschis, 1992), a critical fact to be remembered by all who wish to offer educational programs to these people. Since the 1970's, programs targeted at meeting the learning needs of older adults have emerged and met with tremendous success.

One of the first initiatives that catered to older adult learners came from a group of retired educators who were dissatisfied with the unchallenging continuing education programs. In 1962, the New School for Social Research (NSSR) encouraged this group of educators to form a self-governing group and teach courses to their peers. The initial response was tremendous and only 404, from an initial pool of 3000 applicants, were chosen to participate. Paying a $45.00 entry fee and agreeing to attend weekly study groups during the day, the program became so popular that the waiting list of keen elders who wanted to enrol could not be accommodated (Mills, 1993).

In 1975, out of a response to the success of NSSR program, the first Institute for Learning in Retirement (ILR) was founded at Syracuse University, followed by Harvard and Duke in 1977 (Mills, 1993). Today ILRs meet the needs of over 25,000 participants in over 200

centres throughout North America by servicing the higher educational needs of older adults, through a self-funded, democratically governed membership, community based program (Manheimer et al., 1995; Verschueren, 1995).

In 1972, the department of Health and Welfare Canada created a program called *New Horizons* that encouraged older adults to continue using and improving their skills by assisting with self-help community projects. Aimed at combating the social stereotypes associated with ageing, this program, like the ILRs, continues to thrive today. What began as a social experiment has resulted in a cost effective Canadian social program that has sponsored over 25,000 programs all started and run by seniors (Novak, 1987).

The American ILRs and the Canadian New Horizons Program were not alone in acknowledging and creating education programs targeted at older adults. Pierre Vellas of France also believed in the vitality and longevity of the older population when in 1973 he founded *l' Université du troisième age* (University of the Third Age). The concept of the **third age** is based on dividing the life cycle into four quarters:

> The first age, youth, is a time of dependency when education helps prepare us for future work and family. The second age comes with independence and responsibility for earning a living and supporting a family. The *third age* is one of personal achievement and learning for self-development; the fourth age is the period of frailty and decline. (Manheimer et al., 1995, p. 39)

Reaching out to people aged 50+, *l'université du troisième age* programs are designed to provide educational opportunities, foster friendships, exchange knowledge and ideas, in a non-structured, non-competitive learning environment (University of the Third Age, 1996). A quarter of a century later University of the Third Age programs exist throughout Europe, Britain, Australia, Canada, and to a lesser degree, the USA (Manheimer et al., 1995).

In 1975, Marty Knowlton and David Bianco, founded a program called Elderhostel. Motivated by a desire to combat the negative self-image that society places on older adults, Knowlton and Bianco created an educational-travel program that combined intellectual activity and travel into a meaningful experience. When Elderhostel began it was a small network of five New Hampshire colleges and universities that provided short-term, residential, on-campus, low-cost, college level courses to 220 pioneer hostelers (Knowlton, 1977). In 1980 Elderhostel offered its first international program which typically lasted two to three weeks (Verschueren, 1995). In 1986 Elderhostel Canada was founded, and by 1992, Service Programs were introduced

to enable hostelers to provide volunteer service to worthy causes while enjoying their learning experience.

Today Elderhostel is in 70 countries, serving over 310,000 hostelers annually, and the range of host institutions has expanded to include YMCA's, conference centres, environmental and outdoor education centres, museums, theatres, and national, state and provincial parks, to name a few (Elderhostel Inc., 1998b). "Because of the prominence and size of Elderhostel, it belongs in a class itself" (Manheimer et al., 1995, p. 54). Described as an "educational adventure where minds and experience meet" (Elderhostel Canada, 1997), today Elderhostel's mission statement reads:

> Elderhostel is a non-profit organization committed to being the pre-eminent provider or high quality, affordable, educational opportunities for older adults. We believe learning is a lifelong process; sharing new ideas, challenges and experiences is rewarding in every season of life (Elderhostel Inc., 1998a, p. 1).

In 1981, Kaplan (1981) wrote that the momentum of Elderhostel was irreversible, its impact immeasurable. Yet, despite their unparalleled growth and success, certain programs are over subscribed while others must be cancelled due to insufficient registration. A number of studies have examined the motivation to attend Elderhostel (Adair & Mowsesian, 1993; O'Connor, 1987; Rice, 1986; Romaniuk & Romaniuk, 1982; Wirtz & Charner, 1989) yet there have been few studies focused exclusively at identifying the factors influencing program choice for older adults or identifying what types of people attracted to this type of non-formal educational program.

If lifelong learning is a key to building one's personal capacity and knowledge throughout the lifecycle (Heil & Marks, 1991), then ensuring that a wide range of programs exist that meet the needs of all older adults will be a challenge for years to come. The success of program such as Elderhostel, new Horizons, Institutes for Learning in Retirement and the University of the third Age are testimony to the fact that there is a large community of older adult learners who enjoy participating in educational programs in retirement. If prior education holds as a primary indicator of educational participation in later life, then by virtue of the sheer number of seniors on the demographic horizon, there should be a strong increase in the need for older adult educational programs (Manheimer et al., 1995).

Unfortunately, the majority of the research on older adults has focused on narrow sample populations of older adults enrolled in a course or workshop sponsored by a formal educational institution (Clough, 1992a). Additionally, very little research has focused on understanding the

needs of women, which is unfortunate since they represent the largest percent of participants in older adult educational programs (Harold, 1992). Creating new and innovative learning opportunities for older adults represents a challenge for the future. Increasing the diversity of the people studied and the range of available programs is essential to ensure that the needs of all older adult learners are met; men and women, the highly educated and less educated, the affluent and the poor, the abled and the less abled, to name a few.

### 2.3.3 Leisure and Education

Throughout this century the role of leisure, the time available for leisure, and even the definition of leisure has evolved (Arsenault & Anderson, 1998). Centuries ago, Aristotle defined leisure as a state of "being free from the necessity to labour" (Goodale & Witt, 1985). Leisure activities were once understood to be the activities pursued away from the workplace. That definition no longer holds true. Today the line between leisure and work has become more permeable and, like the concept of lifelong learning, leisure is no longer necessarily an isolated event or activity, it is an integral component of one's lifestyle. Today leisure is accepted as a "state of mind, the time and type of activity engaged in has little to do with where the activity occurs or what type of reward will be achieved" (Sessoms, 1984, p. 22).

How then does this modern definition of leisure relate to lifelong learning, educational opportunities for older adults, and specific programs such as educational-travel? In fact, learning as a form of leisure or as a recreational activity is increasing. After analyzing the trends in adult education Cross (1981) discovered that, between 1969 and 1978, the percent of people reporting taking courses for recreational or leisure purposes rose from 12.6% to 21.2%, second only to work related learning. Of this finding she wrote:

> There seems to be only one consistent trend in the reasons people have given for taking courses over the past decade: a steady increase in the proportion taking courses for personal or recreational reasons – a category that includes education for participation in community activities, for personal and family interests and for social and recreational interests (Cross, 1992, p. 94).

Swedburg (1992) defined leisure education as participating in an organized learning activity that is freely chosen and pursued for the purposes of self-fulfilment or personal satisfaction. What better time in life is there to enrol in educational programs for the enjoyment of learning and enhancing the quality of one's life than in retirement; a time when the extrinsic

rewards associated with degrees and certifications during the professional years are no longer a primary motivator (Arsenault & Anderson, 1998; Cross, 1992; Manheimer et al., 1995)?

### 2.3.4 Travel and Education

The need to travel, like the need to learn, is as old as the human race itself. Centuries ago people travelled on foot to find food and learned how to survive in the world through the stories and lessons shared by family and community members; no departments of education or tourism existed. As society advanced, various forms of travel and places of higher learning afforded select groups of people the luxury of travelling to far away places for the purpose of pleasure or to study away from home (McCourt, 1989). Over the centuries, due to technological, social, political, and economic advances, the opportunity to travel and learn is no longer restricted to the wealthy. In many parts of the developed world these represent common day opportunities. Today when one speaks of learning and travel, associations with education and tourism come to mind. The unique distinction between the pairs of descriptors is that the former represents informal learning and travel where as the latter represents the organized structures, activities, and organizations that offer programs and services designed to meet travel and learning needs (Arsenault et al., 1997).

Tourism is big business. Since World War II it has grown into a multi-billion dollar industry (Gibson, 1994). The Canadian Tourism Commission (1997) claims that international tourism has been the world's fastest growing business over the past decade, averaging 12.5% annual growth rates (on an estimated base of $520 billion CDN) despite the 1989-1993 recessionary years. This growth is predicted to continue until the year 2010.

Tourism was not always this way. Mass tourism only began in the mid 19$^{th}$ century, when advances in engineering made the construction of roadways possible for more people to travel farther, faster and more economically (McCourt, 1989). Today tourism is a world-wide industry that facilitates the ease of movement of people from their usual place of residence to an alternate location. According to the 1981 Tourism Policy Act passed by the U.S. Congress, the tourism industry is defined as "an interrelated amalgamation of those businesses and agencies that provide transport, goods, services, accommodations and other facilities *for travel out of the home community for any purpose not related to day-to-day activity"*(Waters, 1989, p. 9). Tourism is also emerging as an academic field of study.

The interest in travel has increased because of: (1) changing work and leisure attitudes, (2) the need for change or a desire to escape, (3) an interest in learning or satisfying a curiosity, (4) enjoying a period of rest and relaxation, and (5) experiencing excitement and adventure (Anderson, 1989; Crompton, 1979; Dann, 1981; Fodness, 1994; Gnoth, 1997; McCourt, 1989; Myers & Moncrief, 1978). The needs and motivations that inspire one to travel are as diverse as the population and therefore to gain a better understanding of select aspects one must divide the market into smaller segments.

Crompton (1979) identified four major markets within the travel industry: personal business travel, visiting friends and relatives, government or corporate business travel and pleasure travel. Lue (1992) defined pleasure travel as the act of people taking trips to a place, or places outside their home community for the purpose of pleasure. It is the pleasure-travel literature has been drawn upon to inform this study.

As the tourism industry looks towards the next millennium, a number of authors write of the need to expand partnerships to ensure that there is a variety of quality products available to meet the needs of an ever changing population (Adamson & Brobyn, 1994; Bodger, 1994; Canadian Tourism Commission, 1997). One partnership link that is growing in popularity is between tourism and education (Bodger, 1994). The interest in learning is a factor listed in some of the pleasure travel participation studies (Crompton, 1979; Dann, 1981; Etzel & Woodside, 1982; Fisher & Price, 1991; Muller, 1994) but at present it appears to only be a dominating motivator for those involved in educational-travel programs (Arsenault, Anderson, & Swedburg, 1998; Ostiguy, MacNeil, & Hopp, 1994; Rice, 1986; Romaniuk & Romaniuk, 1982; Sage Group, 1993). This may change in the future.

Gibson (1994) describes an educational tourist as one who is interested in study tours, acquiring new skills and knowledge. Bodger (1994) writes that the educational-traveller is primarily motivated by a desire to gain true insight into the destination, and (Anderson, 1989) can be quoted as saying "many people travel in the pursuit of knowledge, truth, and understanding" (p. 21).

Educational-travel is not new, people have been combining learning and travel for centuries through study tour, self-directed travel-learn activities, educational exchanges, conferences. In fact study tours, which date back to the sixteenth century, have for hundreds of years enabled people to travel to different lands and learn about the culture, language, or special

topics of interest (Anderson, 1989; McCourt, 1989). But it is only recently that impact of educational-travel, study tours, and travel-learn experiences are being researched (Li-Jiuan, 1997).

In 1990 the first international symposium on educational-travel was held at the University of Canterbury in New Zealand (Bodger, 1997b). It was titled the Global Classroom and since the first gathering, subsequent conferences have been held in England (1992), Canada (1994), the Netherlands (1997). Arguably a somewhat eclectic group of researchers and practitioners, the Global Classroom has provided a forum for people around the world, interested in educational-travel programs and the emerging field of educational-tourism, to unite and share their knowledge, experiences and research findings. But it not just practitioners and academics who are starting to look at educational-travel. In 1993, Tourism Canada commissioned the Sage Group (1993) to produce a reference document that examined existing and current educational-travel activities for older adults in Canada. The fact that, at the government level, investigations are being launched to learn more about the potential of educational-travel is a sign that this type of program is attracting the attention of people beyond the pioneer organizations.

The horizon looks promising for educational-travel, particularly because of the demographic profile of the Baby Boom population who will soon start to retire (Foot, 1996). "Baby Boomers' romance with education and the reliance on tourism in their quest for self-fulfilment" (Muller, 1994, p. 14) will make what has already been proven a successful program, with select niche markets of older adults, even more promising. What is necessary for future programmers, administrators, and marketers of educational-travel programs for older adults is to understand both the types of participants enrolled in these programs today and the factors influencing their program choice.

## 2.4 Segmenting Markets Through the Use of Typologies

Segmenting a market is one way to create a better understanding of the sub-segments that exist within a larger population (Crompton & Lamb, 1986). Market segmentation takes a population, in this case educational-travellers, and divides it into smaller client groups who share a common set of characteristics, interests, or needs. Regardless of the product, service, or educational program, developing ways to discriminate different sub-segments within a target market can be useful to those charged with developing new products, identifying new markets, creating

promotional campaigns, and formulating distribution strategies (Calantone & Johar, 1984; Etzel & Woodside, 1982; McQueen & Miller, 1985; Moschis, 1992; Shoemaker, 1989; Shoemaker, 1994).

Attempting to establish a single classification system that could identify *the* tourist, *the* older adult learner, or *the* educational-traveller is not possible, nor desirable, given the complexity of the human being and the world in which we live (Cohen, 1979). In fact, it is because of this complex dynamic that market segmentation can be so helpful in taking a large heterogeneous population, such as adult learners, and dividing them into smaller homogeneous segments. Cohen, a sociologist who has done a substantial amount of research in the tourism industry, claims that the challenge is to classify people in such a way that it has both theoretical interest as well as empirical relevance (Cohen, 1979).

Typologies are one way to classify people into smaller groups. Typologies represent theoretical constructs that never exist in a pure form. Individuals approximate one type or another to a greater or lesser extent and can therefore be compared (Dann, 1981). Prevalent in the fields of marketing and consumer research, typologies can be used to organize phenomena, facilitate communication, and reduce masses of information into manageable units to simplify understanding (Boshier & Collins, 1985). Instrumental in revealing the underlying mind-set people hold towards various services, program, or products, typologies can be used to develop advertising campaigns aimed at a specific group, without offending members within the same larger group (Meredith & Schewe, 1994).

The most celebrated typology in adult education is Houle's (1961) three-way typology of the adult learner. Houle examined the lives of 22 adults, using audio-taped interviews and a 19-question interval protocol. These people varied widely in their demographic profile however they shared one common characteristic:

> ... they were so conspicuously engaged in various forms of continuing learning that they could be readily identified for me by their personal friends or by the counsellors and directors of adult education institutions. Otherwise they vary widely in age, sex, race, national origin, social status, religion, marital condition and level of formal education. (Houle, 1961, p. 13)

In his analysis, Houle commented that many of his earlier analyses proved useless, until one day the essence of three subgroups of learners appeared in the data. These he labelled Goal Oriented, Activity-Oriented, and Learning Oriented (Houle, 1961). **Goal Oriented** learners were characterized as people in pursuit of specific, clear-cut objectives who first identified a learning

need, then selected an appropriate vehicle to satisfy their goals. In contrast, **Activity-Oriented** learners participated primarily for the enjoyment of the activity itself. The educational institution was seen as a socially acceptable meeting place, and often there was no connection between the course selected and the reason for enrolling. Finally, **Learning Oriented** individuals sought knowledge purely for the sake of knowing. They differed from Goal and Activity learners in that each learning activity had a specific goal which was satisfied through a continuous range of learning experiences that made the total pattern of participation far greater than its parts.

In the adult education participation literature, Houle's parsimonious typology "remains the single most influential motivational study today" (Cross, 1992, p.82) and has stimulated a tremendous number of researchers to affirm or refine his original categories (Boshier, 1971; Boshier & Collins, 1985; Cross, 1981; Carp, Peterson & Roelfs, 1974; Morstain & Smart, 1974). Three decades after Houle published his typology, Cross (1992) concluded that subsequent studies have illuminated, rather than changed the original typology and rarely add a completely new dimension. Boshier and Collins (1985), however, caution that although practitioners and professors still refer to Houle's Goal, Activity and Learning-Oriented learners, the research of the past years has informed us that these categories are more complex than first envisioned by Houle.

Eleven years after Houle's typology was published, sociologist Erik Cohen (1972) proposed a typology of international tourist roles which has been widely cited in the pleasure-travel literature over the past twenty years (Mo, Howard, & Havitz, 1993). Based on the premise that the phenomena of modern tourism combines a degree of novelty with familiarity, Cohen examined the sociology of tourism and in the process, wrote about four tourist roles, two non-institutionalized – the Explorer and the Drifter – and two institutionalized, the Organized Mass Tourist and the Individual Mass Tourist.

**The Explorer** is one who seeks novelty by getting off the beaten track and associating with the locals. Content to arrange trips alone, this person enjoys being immersed in the host society, but prefers to maintain some of the basic routines and comforts of her or his native way of life. **The Drifter** is also in pursuit of a novel experience, however he or she prefers being totally disconnected from fixed itineraries and traditional tourist establishments. The Drifter is content to venture away from the beaten track, delights in becoming completely immersed in the host culture and is content to have virtually all familiarity disappear while travelling. The signifi-

cant difference between these two types of tourists is the degree to which they relate to their host society (Cohen, 1972).

The least adventurous of Cohen's four tourist types is the **Organized Mass Tourist.** This tourist type remains confined to what Cohen describes as an 'environmental bubble' – a way to view people, places and cultures through the protective walls of that which is familiar. The Organized Mass Tourist prefers familiarity over novelty and is the one who enjoys a detailed itinerary including meals and accommodations, guided tours, air-conditioned buses, basically, the packaged tour (Cohen, 1972, p. 167). The final type, the **Individual Mass Tourist** takes more control of her or his experience, time, and travel itinerary, however, like the Organized Mass Tourist, is more comfortable remaining close to her or his environmental bubble.

Unlike Houle's typology that, within a decade, sparked many researchers to affirm his three types of adult learners, the first attempt to develop a reliable and valid scale to test Cohen's typology did not occur for two decades. In 1993, Mo, Howard, and Havitz changed this by operationalizing Cohen's typology. In their review of Cohen's four types, these researchers identified three dimensions for differentiating tourists.

The first they labelled DOD – the Destination Orientation Dimension – which referred to three primary tourist motives: variety, novelty, and strangeness (Cohen, 1972; Mo et al., 1993). The second was the Travel Services Dimension (TSD) that related to the degree to which a tourist preferred to stay in an institutionalized setting (such as the mass tourist). The final dimension – the Social Contact Dimension (SCD) – related to the degree to which a tourist chose to interact and engage in social contact with the host community and its people. Based on the novelty construct and the three dimensions – DOD, TSD, SCD – the International Tourist Role Scale (ITR) was developed and tested (Mo et al., 1993). The authors reported that the final 20-item scale was both reliable and valid, although the Travel Service Dimension lacked conformity. In conclusion, these researchers recommended that more scale validation would be required to determine if the dimensions examined were universally appropriate.

In a more recent study, Arsenault (1996) proposed a typology of the older adult learner. Her qualitative study, which was grounded in the motivation and adult education participation literature, reported a typology with six types of older adult participants: Activity-Oriented, Adventurer, Geographical Guru, Experimenter, Content-Committed and Opportunist. As her study was conducted with Elderhostel participants, (people who were enrolled in an education-

travel program) it was not surprising to discover some resemblance to Houle's typology. What was not known, when Arsenault's study concluded, was that her typology also bore a resemblance to Cohen's.

When the literature review for this study was expanded to include the pleasure travel literature, the similarities with Cohen's typology became immediately apparent. Arsenault's **Geographical Guru** possessed characteristics similar to Cohen's **Explorer** whereas her **Adventurer** leaned more towards Cohen's **Drifter**. Despite the fact that Arsenault described older adults and Cohen described the drifter as the one freshly out of university and off to see the world, the similarities are there. Perhaps there is a parallel phenomena to be found between the newly retired who, like the youthful graduate, also feels this sense of freedom and wants to take time to see and experience the world with no real boundaries, except those which are self-imposed.

Arsenault's **Adventurer** also shares some characteristics with Houle's **Activity-Oriented** in so far as Elderhostel is seen as a socially acceptable venue for learning, particularly for single women and people who plan to travel alone. Beyond the social link however, there is little similarity. Perhaps this is because this factor is more complex than Houle first envisioned (Boshier & Collins, 1985). While Houle broadly defined his participant as one who primarily enjoys participating as an activity itself, Arsenault found that the older adult **Activity-Oriented** participant was one who looked specifically for programs where that offered a learning experiences with a physical activity component, or programs where the learning occurred outdoors. In fact, Arsenault's definition more closely resembles one of Shoemaker's (1989) three market clusters, the **Active Resters** – people who like to fill their trips with activities such as sight seeing, special events, attractions, and engaging in physical activity.

Certainly one can see similarities between Arsenault's **Content-Committed** and Houle's **Goal Oriented** in that they both describe participants who seek out a learning experience to fulfil a specific learning goal. For the average career aged adult (18-60 years) this may involve registering in a certification course to further one's employment. The retired person, in contrast, may search for a specific course, such as genealogy, that facilitates a personal goal of writing a family history.

Finally, Arsenault's **Opportunist** and **Experimenter** do not resemble the participants described by either Houle or Cohen; they are new types, hybrids perhaps that emerge from uniting the benefits of learning and travel into a single program option.

The simplicity of typologies is part of their beauty and while they do not provide a blueprint to understand all participant types, they do provide a framework for investigating the characteristics and interests of sub-segments of large populations. Typologies however do have their limitations. One of the greatest difficulties with typologies in is that for a 'type' to be 'pure' it must be both exhaustive and mutually exclusive (Bailey, 1994), which of course is not possible with human beings.

Like any classification scheme, it can be argued that typologies are of limited value because they 'over-simplify' that which is by nature is complex (Boshier, 1985). Baily (1994) identified several other limitations of typologies: (1) some people view typologies as static and descriptive rather than dynamic, (2) the constructs are theoretical, (3) there is no 'magic formula' for selecting variables, and (4) large typologies become unmanageable. Yet despite these limitations, typologies have many assets; they facilitate a parsimonious presentation of complex phenomena, allow for similarities and differences to be identified, permit comparisons and they are versatile, and they stimulate further research (Bailey, 1994; Cross, 1992, Houle, 1961; Patton, 1990). This study used these three typologies (Arsenault, 1996; Cohen, 1972; Houle, 1961) to better understand the educational-travel participant.

## 2.5 Factors Influencing Program Choice

Older adults are a heterogeneous group of individuals in terms of their learning needs and abilities (Heil & Marks, 1991). Research aimed at understanding pre-boomers, traditional seniors, and the new elderly is gaining prominence as the number of elders in society set new record highs each year. Shoemaker (1989), who studied the senior pleasure travel market, wrote that the impact of the 55+ market has become a major force in the US marketplace. He cites articles from *Business Week, Fortune*, and the *Wall Street Journal* that attest to the importance of this group. Yet like others (Jean, 1994; Muller, 1994; Thornton, 1992), he emphasizes that there is a shortage of research aimed specifically at understanding older adults and identifying the important variables which will contribute to a better understanding in the future.

When selecting an educational program, different people will apply different criteria in making their decision. In fact, with each new program registration, the importance of various criterion may change as individual needs, interests, and situations evolve and are impacted by new or different external forces. Whether a participant bases her or his choice on personal,

reference group or business related criteria, it is critical to remember that consumers often use more than one criteria, the number of criteria used to make a decision is usually small, and often one criterion becomes the focal point around which all related decisions are made (Walters & Bergiel, 1989).

The adult education, educational gerontology, and pleasure travel literature is rife with studies that examine the motivation of participants and the benefits sought from these different experiences. This final section of the literature review first profiles four studies that had the greatest impact on this inquiry. Then, based on these studies, the motivational factors related to why adults and older adults participate in educational programs or engage in pleasure travel activities are synthesized and the common motivators identified.

## Adult Education: Boshier (1971 – 1991)

The research by Roger Boshier has made a tremendous contribution to understanding the reasons why adults participate and do not participate in educational activities since the early 19070s (Boshier, 1971, 1973, 1977, 1989, 1991; Boshier & Collins, 1985). Like Houle, his work has played a fundamental role in shaping what we know about the participation of adults in education. His most famous contribution to the field is the Educational Participation Scale (EPS). In its original form, the EPS contained 48 items, that when factor analyzed (0.40 loading criteria) identified seven factors related to the motivational orientation of adults in education: (1) inter-personal improvement/escape, (2) inner versus other-directed advancement, (3) social sharing, (4) artefact–conformity, (5) self-centeredness versus altruism, (6) professional future orientedness, and (7) cognitive interest (Boshier, 1971).

In 1977, after substantial use and international acceptance, the number of items in the EPS was reduced to 40. Fourteen years later, Boshier recommended retiring the original instrument after testing an alternate version of the EPS (Boshier, 1991) and verifying that it was as psychometrically defensive as the original instrument in terms of its concurrent and predictive validity. The motivation behind developing this new instrument was linked to the fact that he found the original ties to Houle's (1961) typology limiting. In addition, the original EPS represented middle class ethos which were not wholly desirable in the 1990s and statistically, the unequal number of items in each factor complicated scaling (Boshier, 1991). Boshier tested the new instrument in five phases with an ethnically rich population that included Adult Base

Education students, prison inmates, foreign students at a Canadian university, English as a Second language students, undergraduate nurses, and immigrants.

The new instrument revealed seven factors, the first five representing familiar constructs in the adult education participation literature, the last two are relatively new:

1. Social contact– meeting people and making friends (similar to Houle's Activity-Oriented);
2. Professional advancement – developing ones professional capacity through learning (related to Houle's Goal-Oriented);
3. Cognitive interest – learning purely for the sake of learning and satisfying an inquiring mind (reminiscent of Houle's Learning-Oriented);
4. Social stimulation – participating because of a need to escape unhappiness, boredom, or loneliness;
5. Educational preparedness – to remedy past educational deficiencies or prepare for more specialized education;
6. Communication improvement (new) – improving verbal and written skills and understanding the customs related to communication; and
7. Family togetherness (new) – bridging generation gaps and improving family relations.

It is worth noting that by expanding the sampling population to include ethnic diversity and participants engaged in varying levels of educational programs (i.e. Adult Basic Education to University), the reasons why people participate expanded. On one level this is an exciting discovery, for as new populations, such as older adults, become the focus for new lines of research, the breadth of understanding educational participation should increase. Sadly, one cannot help but wonder why it has taken so many years for this diversity to be acknowledged in the research community. Over a decade ago, Brookfield (1986) criticized the adult education research community for continuing to use narrow sampling frames that focused on adults in continuing education programs. He claimed that this focus was too narrow and that the research community should consider the lifelong learning needs of adults of all ages and include subjects from the wide range of educational programs outside college and university institutions now available.

## Pleasure Travel: Crompton (1979)

The purpose of Crompton's (1979) study was to identify the motives of pleasure vacationers that influence the choice of a destination. He also sought to develop a conceptual framework that encompassed these motives. Like Boshier, Crompton's research over the past two decades has received a tremendous amount of attention among travel researchers. Based on 39 unstructured two-hour interviews, using a primarily middle class convenience sample of 19 women and 20 men, Crompton content-analyzed interview transcripts and concluded there were nine pleasure-travel motivations, seven socio-psychological and two cultural.

The socio-psychological motives were reportedly difficult for participants to articulate for often the value, benefit, or satisfaction a person sought from a vacation was not derived from the location but rather a social or psychological factor unique to the individual or group. The first factor Crompton identified was to 'escape from a perceived mundane environment'. The pleasure vacation needed to be socially and physically different from one's regular life. The second factor, 'exploration and evaluation of self', facilitated a need for self-discovery in a new situation. Here, the novelty of the social and physical contexts was a key component. 'Relaxation' was the third motive and referred to a mental state rather than physical state. Crompton arrived at this conclusion because a number of interviewees admitted coming home exhausted from an active vacation but feeling relaxed. The fourth motive was 'prestige', a factor which disappears the more one travels. The fifth, 'regression' provides the opportunity to slip out of one's shell and slip into activities that would not be possible within the context of everyday life. The motivation here was often nostalgic, wanting to return to a childhood activity, or searching for remembrances of a previous lifestyle. The sixth factor was 'enhancement of kinship relationships' where the pleasure travel experience becomes the medium to enhance or enrich family relationships. The final socio-psychological factor was 'facilitation of social interaction', where the vacation motivation was oriented more towards people than places.

The two cultural motives Crompton identified were novelty and education. Whereas the first seven factors related more to the individual, these two factors related to the destination. The 'novelty' motive was defined differently by various respondents but include synonyms such as curiosity, adventure, new, and different. Novel did not necessarily mean to learn new things, for some it was a new experience, for others it was the opportunity to 'see something' rather than just know of it vicariously. Consistent with Cohen's (1972) novelty-familiarity continuum, the degree to which people were motivated by novelty ranged from within the 'environmental

bubble' to more adventurous environments. Finally, the **education motive** was described as a means of developing a well-rounded individual, a moral obligation to learn about the world, or the desire to participate in a once-in-a-lifetime opportunity to learn about something related to a particular destination.

A useful concept introduced by Crompton refers to 'push and pull' factors. The **push factors** are socio-psychological motives such as escape, relaxation, novelty, and social interaction, and within the travel industry, push factors are the reasons that motivate a person to take a vacation. The **pull factors**, on the other hand, are "motives aroused by the destination rather than emerging exclusively from within the traveller himself" (Crompton, 1979, p. 410). Pull factors actually respond to and reinforce the push factors in satisfying a motivator, as one Elderhosteler stated "My husband and I have been to the same place three times and half the people had been there before. They have a tremendous director, really excellent teachers, warm atmosphere, and it's intellectually stimulating" (Arsenault, 1996, p. 71). One must be careful, however, because researchers have confused the terms over the years by attributing the primary motive to pull factors, rather than where they belong, with the push factors (Dann, 1981). Bello and Etzel (1985) acknowledge the push-pull concept as useful but argue that this continuum is too simplistic and that motives fall along that continuum, rather than at opposite ends.

This argument is not unlike the one in education concerning the instrumental-expressive continuum introduced by Havighurst (1969) and challenged by O'Connor (1987) and Wirtz and Charner (1989). Havighurst introduced the concept of **instrumental education** as learning that relates to an external educational goal that rests outside and beyond the act of education and is used as an instrument of change (e.g. purposeful education). **Expressive education** on the other hand is "education for a goal that lies within the act of learning, or is so closely related to it that the act of learning appears to be the goal" (Havighurst, 1976, p. 42). For example, an older adult learns to golf, not to seek acceptance on the Seniors Golf Tour, but rather to enjoy the outdoors, the physical and social activity.

### Older Adult Education: Romaniuk and Romaniuk (1982)

Often cited in the research of older adults in education is the 1982 study by Romaniuk & Romaniuk (1982) who examined the participation motives of older adults in higher education using Elderhostel participants. This comprehensive survey of 498 Elderhostel participants (82% response rate) examined fourteen motives associated with the decision to attend Elderhostel and

investigated the difference between new and return participants. Using descriptive statistics and discriminant analysis, Romaniuk and Romaniuk reported that the decision to attend Elderhostel was most strongly related to two factors, the learning content (new learning, course description), and new experiences (people and places). These findings were consistent with the article written by Knowlton (1977), one of the founders of Elderhostel. The desire to participate in higher education was not a critical factor, which could be explained by the fact that the base level of education in the sample was higher than the national average. Finally, of least importance was the reputation of the college, the Elderhostel venue.

Romaniuk and Romaniuk (1982) also examined the difference between new and return participants. New participants were primarily motivated by the initial low cost investment, being close to home, travelling with a companion and advice from friends. The return participant was quite different. The underlying features of the program itself, learning something new and travelling to new places had a greater influence on return participants then new recruits.

### Educational-Travel: Arsenault (1996)

Sixteen years later, Arsenault (1996) confirmed most of the findings reported by Romaniuk and Romaniuk in her qualitative study of Elderhostelers. Like Romaniuk and Romaniuk (1982), Arsenault reported a distinction between the new and return participants, as well as, distinctions related to: (1) participants who plan to attend alone versus those who plan to attend with a companion; (2) participants who plan to travel only a short distance (< 6 hours of ground travel) to attend the program versus those who plan a 'vacation with Elderhostel'; and (3) participants who are motivated by the topic to be studied (e.g. genealogy) versus participants who are attracted to the structure of the program (e.g. three different unrelated courses, a single program theme, or the amount of learning in an outdoor setting.

The major findings identified in this study included a six-type participant typology of the older adult learner and descriptions that revealed the dynamics of fourteen factors influencing educational program choice (Table 4).

**Table 4 Factors Influencing Program Choice**

| Factor | Decision Related To | Select Descriptive Elements |
|---|---|---|
| Location | The desired geographical destination. | Geographical attractions, area assets, nostalgic feeling for an area or curiosity. |
| Travel | The travel distance, method of transport and length of the journey. | Access by bus, car, or train; interest in an overseas experience; the one-tank-tripper who travels close to home; the vacationer who attaches an Elderhostel to previous travel plans or enrols in 2 or more programs. |
| Program | The structure of the program. | The balance of time spent seated in a class vs. time spent in a natural learning environment, outdoors, engaged in physical activity, practising what is taught in class. |
| Course Content | Desired or anticipated learning opportunities available from the course itself. | Attracted to a specific topic, meets a specific learning need, builds on current knowledge, and wants to be challenged at different levels of learning. |
| Accommodations | Elements typically associated with accommodations. | Private bath, single supplements, ability to cater to special needs, arrive early/stay late options and food quality. |
| Cost | All moneys spent to register for a program and travel to and from the location. | Travel off-season, cost efficient to combine with existing plans, good value for money, low price extends travel budget. |
| Dates | The best time to enrol in an Elderhostel program. | Must fit with existing plans, avoid tourist season, personal preference for a specific month, season, year, or climate. |
| Negotiate with Travel Companion | The negotiation strategy used to reach consensus when selecting a site. | Joint decision, compromise, follows a particular negotiation process. |
| Social | The interest in being with people, similar to oneself. | Meet people of a kindred spirit, make new friends, rapid social integration, everyone welcome, interesting, fun people, singles equally accepted. |
| Sites | A specific Elderhostel location, elements generally managed by the local site co-ordinator. | Reputation of the site, program, instructors, site and volunteer co-ordinators; ability to cater to special needs; extra curricular activities. |
| Elderhostel Organization | Policies, program requirements, methods of operating and the philosophy specific to Elderhostel. | Age eligibility, policy for obtaining 1st, 2nd or 3rd program choice, a unique non-touristy organization, good quality instruction, must attend classes. |

| Factor | Decision Related To | Select Descriptive Elements |
|---|---|---|
| Personal Requirements | Personal needs or interests. | Always wanted to go to college, enjoy intellectual challenges, prefer physical activity courses, special physical needs. |
| Escape | The need to get away and/or take a break. | Family tragedy, new living arrangements with family members, need for a change. |
| Information | The content, quality, timeliness, and volume of materials required to make an informed choice. | Catalogue content, distribution, word of mouth advertising, participant endorsement, published articles or advertisements about Elderhostel. |

Source: Arsenault, 1996

### 2.5.1 Educational-Travel: A Synthesis of the Research Findings

The purpose of this section is to draw some connections between the reason adults participate in organized learning with the reasons people engage in pleasure travel. Understanding these links is important to programmers, administrators, educators, and marketers for three reasons. First, although the motive to travel and learn is just one element in understanding participation, it is critical (Fodness, 1994; Selman & Dampier, 1991). Second, it is important to study why people do what they do in order to understand consumer behaviour (Kindra, Laroch, & Juller, 1994). Finally, motivation is one base on which to identify and understand segments within a given market (Crompton, 1979).

The studies cited in this section of the literature review relate to the motivation, benefits sought, and factors influencing the choice of an adult education program or pleasure travel experience. This discussion is meant to be illustrative, not exhaustive. In selecting the studies to include in this discussion three criteria were considered. Of greatest importance was selecting studies that helped illustrate the overlap between why people enrol in adult education programs and why people travel for pleasure. Second, despite the tremendous amount of valuable research on young and middle aged adults, people aged 18-55 years, the priority was to locate studies that sampled older adults whenever possible. Finally, care was taken to ensure studies were selected from the 1970s, 1980s and 1990s, as they represent the years when most of adult education, educational gerontology, and pleasure travel research occurred.

To begin, Table 5 provides a synthesis of the factors and motives identified by Boshier, (1991) Crompton (1979), Romaniuk and Romaniuk (1982), and Arsenault (1996). It was constructed to see where the commonalities exist between four different researcher who have looked at adult motivation in travel or education. Table 5 was constructed to place the findings within a framework that could be used to examine the findings of additional researchers. The column heading contains a factor label, selected by the author, then into each row, the findings from each of the four studies are located. The remainder of this section discusses each of the factors listed in Column 1 by including the finding from additional studies.

**Table 5 A Synthesis of Educational-Travel Factors**

| Factors | Boshier (1991) | Crompton (1979) | Romaniuk's (1982) | Arsenault (1996) |
|---|---|---|---|---|
| Enrichment/ knowledge | Cognitive interest, Communication improvement | Education | New learning | Course content |
| Equilibrium | Social stimulation | Escape | -- | Escape |
| Family-Friends | Family togetherness | Enhance kinship relationships | -- | |
| Pragmatic | -- | -- | Course descriptions, Advice, Dates | Cost, Dates, Program, Information, Travel, Accommodations, Sites, Elderhostel Organization |
| Purposeful | Professional advancement, Educational preparedness, | -- | -- | -- |
| Social | Social contact | Social interaction | Meet new people | Social |
| Unique Experiences | -- | Exploration and self-evaluation, Regression, Novelty | Visit new places | Location |
| Other | -- | Relaxation | -- | Personal requirements |

#### 2.5.1.1 Enrichment-Knowledge

The opportunity to gain knowledge and seek personal enrichment is a motivational factor and a benefit derived from participating in adult education courses and pleasure travel activities. As one may hypothesize, this is a primary motivator in most of the adult education participation research and, although learning is important to many pleasure travellers, it is not reported as a primary motivator.

A variety of researchers have reported a factor that could be placed within the enrichment-knowledge category. In reviewing all these factors, one discovers that there are four themes: (1) self-actualization, (2) the desire to be a better citizen, (3) general knowledge, and (4) cultural. Self-actualization is defined as the need to grow and use ones abilities to the fullest and most creative extent possible (Maslow, 1954). It is the highest order need in Maslow's Hierarchy of Needs, and Manheimer et al. (1995) claim that many in adult education feel this should be the ultimate goal for older adults. While this may be true for learning in retirement, 'learning for the sake of learning' has been a consistent factor reported in studies by leading adult education researchers during the 1960's and 1970's with adults of all ages (Boshier, 1971; Havighurst, 1969; Houle, 1961; Morstain & Smart, 1974). Learning for the sake of personal satisfaction is reported by approximately 33% of potential learners as their main reason for participating and this type of learning is often considered a luxury for those who are not motivated by professional or economic gain (Cross, 1992). The populations Cross highlights for luxury learning include older and retired persons, women, and the privileged classes.

A desire to be a better, more informed citizen and serve mankind is reported in the adult education-participation literature but not in the pleasure travel literature. Boshier (1971) labelled this motivator 'self-centred versus altruism' and defined it as the desire to be a more effective citizen while getting relief from ones regular life routines. Three years later Morstain & Smart (1974), from their sample of 611 American college participants, reported a similar dimension that they labelled social welfare. Individuals who scored high on this dimension viewed their education as a way of preparing to serve mankind and the community. Cross (1992), in her summary of the adult education participation research wrote that the desire to become a better citizen is important, but only to 25% of the participants.

Cognitive interests and a desire for personal enrichment are related to both adult education and pleasure travel participants (Boshier, 1971, 1991; Clough, 1992a; Crompton, 1979;

Cross, 1992; Dann, 1981; Etzel & Woodside, 1982; Fisher & Price, 1991; Fodness, 1994; Manheimer et al., 1995; Merriam & Caffarella, 1991). In a recent study on the participation of Elderhostelers in Saskatchewan, Ostiguy et al. (1994) reported that learning new skills was a motivator for participants; and that learning something new and acquiring knowledge, may be reasons that influence non-participants. Roberto & McGraw (1990) who examined course selection and motivation factors influencing Elderhostel and community-based older adult participants found that gaining new knowledge was the most frequently cited reason for Elderhostelers (88%) and community based learners (98%). He also reported that personal achievement motivated a smaller percent of Elderhostelers (45%) and community based learners (63%). Arsenault (1996) and Romaniuk and Romaniuk (1982) found that participants wanted to study a particular topic, attend specific programs for the anticipated learning opportunity, build on current knowledge and be challenged intellectually.

Crompton (1979) described the education factor, for pleasure travellers, as being related to a desire to become a well-rounded individual, learn about the world, or experience a once-in-a-lifetime opportunity. This study was cited in an article by Fodness (1994) who divided the pleasure travel literature into a functional framework for analytic purposes. One of the categories he reported in his matrix was a knowledge function, into which he inserted the findings from ten additional pleasure travel studies which highlights the fact that learning and travel are benefits, which some people desire from participating in a single activity. Finally, in comparing learning as a differential motivator for near and distant travellers Etzel & Woodside (1982) reported that intellectual stimulation and increasing one's knowledge about different places was higher for the distant traveller, than the near-home traveller.

The last element, deriving cultural benefits from adult education courses or pleasure travel experiences, has been identified in a number of studies (Crompton, 1979; Etzel & Woodside, 1982; Fisher, 1986; Morrison, 1994; Muller, 1994; Wirtz & Charner, 1989). For example, Etzel & Woodside (1985) who studied 'near and far' vacation market segments of middle aged people ($\bar{x} = 44$ years) reported that the distant traveller finds greater cultural value in the experience when compared to the near home vacationer. Perhaps as global travel becomes more and more accessible, and the number of children born into multi-cultural families increases, the cultural motivation may increase in prominence.

### 2.5.1.2 Equilibrium

The need to escape, relax, and have a change in one's normal routine are cited as motivations to participate in both the travel and adult education and educational gerontology literature. Fisher & Price (1991) relates this group of motivators to the need to physically and psychologically distance oneself from a stressful situation thus enabling a person to more effectively deal with her or his problems. While they wrote this of a pleasure travel experience, the same could be said for people who enrol adult education, or educational-travel, courses to 'get away' from it all. The motivations here may also relate to both a desire to avoid over-stimulation in one's life or to escape under-stimulation (Mannell & Iso-Ahola, 1987).

As early as the 1970's the equilibrium factor has appeared consistently in the adult education literature, albeit under different labels. Boshier (1971), Morstain and Smart (1974) and Carp, Peterson, & Roelfs (1974) reported that, for some, participating in adult education enabled them to get away from the routine of everyday life, escape a personal problem, avoid boredom, loneliness or unhappiness. Similar reasons are reported in the pleasure travel literature (Crompton, 1979; Woodside & Jacobs, 1985). Others report education and travel activities provide the opportunity to help cope with major life changes (Bass, 1986; Fisher & Price, 1991; Henry & Basile, 1994) or enjoy a temporary fantasy, a release from that which inhibits a person at home (Dann, 1981).

### 2.5.1.3 Family-Friends

The pleasure travel literature, more so than the adult education participation literature, cites the desire to be together (Shoemaker, 1989), the opportunity to enhance kinship relations (Crompton, 1979), and the desire to visit family and friends (Muller, 1994; van Harssel, 1994; Vandersluis, et al., 1994) as primary reasons for certain individuals. Recently however Boshier (1991) identified family togetherness (bridging generation gaps and improving family relationships) as one of the reasons why adults were enrolling in courses. One reason this factor may have emerged was because Boshier sampled an ethnically diverse population, which has not been the norm over the years in the adult education participation research. In fact, Brookfield (1986) criticized adult education research for using narrow sampling frames (well-educated, white, middle class), focused on adults in continuing education programs.

The same criticism could be extended to the research on older adults since many of the studies involve Elderhostel participants – people who are typically white, well-educated, and financially secure (Quintern-Reed, 1992). However in fairness to the research community, particularly those interested in education for older adults, this restriction may be related more to demographics (number of older adult learners enrolling in programs) and a slow evolution in the availability of programs designed with the mature audience in mind. The simple fact is, to date there has been a very limited range of programs available to the senior population, and those who attend have a demographic profile which is not ethnically diverse (Manheimer et al., 1995). As the demographic profile of the general population shifts over the next decades and the number of immigrants living in Canada and the USA (who have equal access to education) increases, one would hope that researchers will target understanding their participation in educational activities.

An alternative approach is to examine the influence of family and friends on selecting an educational program, or deciding on a pleasure travel experience, from a consumer behaviour perspective. Here, family and friends function as a filter through which individual decisions are guided. This is because friends and family generally constitute a more homogenous reference group in terms of their values, attitudes, personalities and motivations (Kindra et al., 1994). There are four types of decisions and marital roles that influence decisions, wife dominated, husband dominated, syncratic (joint decisions) and autonomous (independent choice) as well as two types of strategies for reaching a decision within families – persuasion and bargaining (Kindra et al., 1994).

To date, there has been no research aimed exclusively at assessing the impact of joint decision-making, or the influence of friends or family members, on older adult educational program choice. This highlights yet another weakness in the adult education literature related not only to narrow sampling frames, but the fact that a great deal of energy is spent studying motivation, but few have taken it one step further to determine if the reasons one is motivated to enrol are the same as the factors influencing program choice. While some of these factors may be the same, the importance placed on them when actually selecting and paying for a program may change. Consider, for example, the older adult learner with a physical disability that requires them to attend a program with an attendant. The motivation to enrol in a course could be related to a desire to learn about a specific topic to enhance her quality of life, however the choice of whether to enrol in a community based program or a university program may be more related to

finding a course that is offered at convenient time and date that is mutually acceptable to the learner and her attendant.

Understanding joint decision-making adult learners would be extremely useful to people who plan and market educational programs, particularly educational-travel programs, because the majority of older adults prefer to travel accompanied (Sage Group, 1993; van Harssel, 1994). When planning to attend a program with a companion, meeting the needs of two or more individuals compounds the decision-making process. As Arsenault's (1996) discovered in her study, people who planned to attend the program with a companion had extremely colourful ways of describing how they reached a final program choice. The range spanned from one partner simply accepting their partner's choice, to other partners 'telling' their companion which program they would attend. In some settings, choosing a program of study was more democratic, for example using highlighter pens and elaborate colour-coding schemes to review the promotion material. Each companion would independently review the material and highlight, in their colour, their program preferences. The final 'short-list' of programs was negotiated based on the reduced set of options that had been 'coloured' by all. Understanding joint decision-making could have a very practical application, particularly in the marketing of educational programs that want to attract people who may likely attend accompanied.

#### 2.5.1.4 Pragmatic Influences

Considerations relating to cost, comfort and quality of the accommodations, employment, dates, seasonal influences, program information and course descriptions are all examples of the pragmatic influences that impact the choice of an adult education or educational-travel program (Arsenault, 1996; Henry & Basile, 1994; Ostiguy et al., 1994; Rice, 1986; Romaniuk & Romaniuk, 1982; van Harssel, 1994). These are also the factors that can be found in the non-participation literature as barriers, reasons why people do not enrol in adult education programs (Selman & Dampier, 1991).

#### 2.5.1.5 Purposeful

Often the reason one enrols in an educational course is for a specific purpose. Houle (1961) described this as goal-oriented learning, enrolling with clear and specific objectives. Certainly much of the adult education literature (that has sampled adults aged 18 to 55 years) has found this to be true. Depending on the study, purposeful learning has been described as a

motivational factor related to professional advancement, obligation fulfilment, and meeting external expectations, (Boshier, 1971, 1989, 1991; Carp et al., 1974; Cross, 1981, 1992; Merriam & Caffarella, 1991; Selman & Dampier, 1991).

Purposeful motivation is also related to the concept of instrumental learning as posited by Havighurst (1969) and explored in further detail by subsequent researchers (Hiemstra, 1976; O'Connor, 1987; Wirtz & Charner, 1989). The studies done with older adults describe purposeful learning, however rather than relating to career objectives and professional advancement, the purposes are related to fulfilling a leisure need or personal objective for learning (Morrison, 1994; Shoemaker, 1989; van Harssel, 1994; Vandersluis et al., 1994; Wirtz & Charner, 1989).

#### 2.5.1.6 Social

The benefit of social interaction, meeting new people, and sharing experiences with friends is well documented in both the education and tourism literature as a reason to participate (Arsenault, 1996; Boshier, 1971, 1991; Carp et al., 1974; Cohen, 1972; Crompton, 1979; Cross, 1992; Henry & Basile, 1994; Houle, 1961; Merriam & Caffarella, 1991; Mills, 1993; Morstain & Smart, 1974; Quintern-Reed, 1992; Rice, 1986; Romaniuk & Romaniuk, 1982; Wirtz & Charner, 1989). In most cases, the social factor is a push factor, related to the desire to be with people rather than being drawn by attributes of the educational course, travel destination or specific educational-travel program. However in the case of Elderhostel, which has a strong reputation for its welcoming, positive, social environment (Arsenault, 1996), it may in function as a pull factor; particularly for programs (or program locations) with a reputation for their extra-curricular social activities. Elderhostelers themselves describe the social factor as being at the heart of the organization's success as evidenced in the following participant comments.

> The reason we keep coming back is social. It's Elderhostel's greatest asset and if this were ever to diminish, we would stop coming to Elderhostel.
>
> The fact that people can weave into the social fabric of Elderhostel is what makes the organization so strong. (Arsenault, 1996, p. 67)

#### 2.5.1.7 Unique Experiences

Cited primarily in the pleasure-travel literature and adult education studies that sampled Elderhostelers, new experiences, adventures, and once-in-a-lifetime opportunities are prime motivators for certain people. Crompton (1979) identified three factors that this author would categorize under the label unique experiences: regression factor (motivation to engage in

activities a person wouldn't normally do), novelty (curiosity, adventure, new and different experiences) and exploration and self-evaluation (need for self-discovery in a new situation). Vandersluis et al. (1994), who studied women who vacation in recreational vehicles, found that seeing the sights and exploring new places was important to the women in her study. Etzel & Woodside (1982), who studied the difference between near and distant travellers, found that the distant traveller was more motivated by seeking a one-of-a-kind experience and adventure. Similarly, the desire for adventure, to visit and learn about new locations, and to try something new are reasons also identified in Elderhostel studies (Arsenault, 1996; Rice, 1986; Romaniuk & Romaniuk, 1982).

#### 2.5.1.8 Other

An assortment of miscellaneous factors appeared in isolation or with little concurrence to other studies in the literature. This may be due to the process of classifying factors. But, given that they were important enough for others to report, they are included to acknowledge their presence, in the event that they represent factors that have not been fully explored, or factors that may become more prominent with certain niche markets as the future demographic profile of participants change and new programs emerge.

Mental relaxation was a factor reported by Crompton (1979) who studied the motivation for pleasure-travel with adults primarily 30 to 45 years of age. It was also reported by (van Harssel, 1994) who gathered information on the perception and preferences of older pleasure travellers in the USA and reported that pleasure travel was mentally relaxing but not always physically relaxing. Some participants even claimed to return from a vacation physically exhausted but mentally refreshed. Other factors include: not wanting to be too far from home (Arsenault, 1996; Ostiguy et al., 1994), concerns about uncomfortable buses, stopovers and lack of information (van Harssel, 1994), and physical limitations related to walking, hearing and vision (Arsenault, 1996; Ostiguy et al., 1994).

The bedrock upon which much of the adult education, barriers to participation research, came from Johnstone & Rivera (1965) who revealed two types of deterrents, situational and dispositional. Situational deterrents relate to external factors such as personal finance, availability of childcare and spare time. Dispositional deterrents relate to internal attitudes about education, which impede participation. A third classification, institutional deterrents (such as restrictive locations, the scheduling of classes, pre-requisites, and the time required to complete a

program) was added by Cross (1981). Finally Darkenwald and Merriams's (1982) research concurred with situational and institutional barriers, and introduced a fourth barrier, informational, described as the failure of institutions to adequately communicate information to participants and a failure of participants to seek out the information they require. Identifying the barriers to participating in pleasure travel was not a focus of this study, however once the factors influencing program choice for the educational-traveller are better understood, it would be valuable to return to the deterrents literature to examine who does not participate in this type of program and why.

#### 2.5.1.9 Summary

The purpose in synthesizing the findings of previous authors who report on the motivation to participate, the benefits sought through participation, and the factors affecting program choice, is to begin to draw together the literature relating to education and travel. While direct comparisons are not possible, because there is no common denominator with the sample populations, and the range of programs available to senior citizens has been limited (Manheimer et al., 1995), it is Nonetheless a beginning to identify education and pleasure travel variables in the literature that can serve as a foundation for future study. This review clustered selections from the literature related to adult education, educational gerontology, pleasure travel, and the small body of information related to educational-travel into seven categories: (1) enrichment-knowledge, (2) equilibrium, (3) family-friends, (4) pragmatic, (5) purposeful, (6) social, (7) unique experiences, and (8) other.

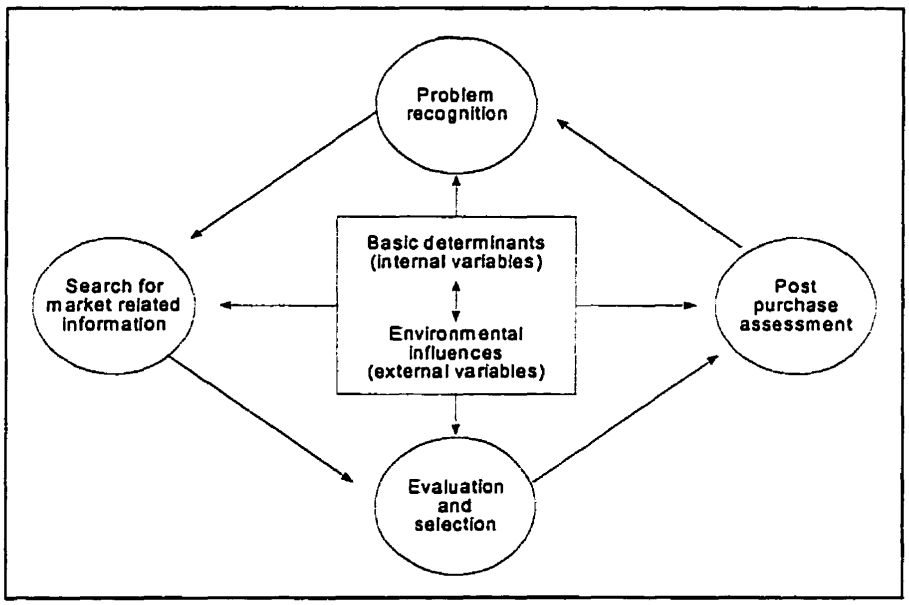
## 2.6 A Consumer Behaviour Perspective

The study of consumer behaviour has developed into a discipline of its own right based on research, scientific knowledge, models and theory (Kindra et al., 1994; Robertson & Kassarjian, 1991). It is defined as the "configuration of thoughts, feeling, and activities that make up the process of acquiring and consuming an economic good" (Kindra et al., 1994 p. 4). If one agrees that an adult education program is a consumer good, then all participants who enrol in an educational course can be described as consumers and therefore understood from this perspective.

Selecting an educational program is a complex process that is influenced by many variables. Similar to any other consumer choice, there are options, alternatives, and a number of factors that impact people when they select an education, or educational-travel program. To gain a better understanding of this process, the author referred to the field of consumer behaviour and examined two models, one related to the decision choice process and one which described the acquiring and consuming an economic good.

Walters and Bergiel (1989) described the consumer decision process quite simplistically, as a 4-step process that is continuously impacted by internal and external variables (Figure 6). Internal influences include a person's needs, motives, attitudes, perception, and personality, whereas the external are cultural, social, economic, family, and business-oriented (Walters & Bergiel, 1989).

**Figure 6 Decision Choice Process**




Source: Walters & Bergiel, 1989

The process begins with a purchaser recognizing he or she has a problem and asking whether or not the problem should be solved, if so what will solve the problem, when should it happen, where a solution can be found, how can it be paid for. It is at this early stage where motivation, perception and attitudes have the greatest impact on the problem. The environmental factors that exist at this stage are of lesser importance.

The second step is a search for market related information, which Walters and Bergiel (1989) describe as a consumer learning process where products, brands, stores, sales, services and/or costs are compared. The internal search looks for data stored in memory, such as a previous experience, the external search extends beyond one's own experience and gathers new information needed to make a decision.

Once the market search is complete, the consumer must evaluate the available options, decide upon a course of action, and ultimately purchase the product or service. The final step is the post-purchase assessment, which involves the consumer comparing perceptions and experience with the product, to determine if it matched her or his expectation. When there is a gap between expectation and experience, dissatisfaction may be the end result. This post-purchase assessment is critical for it impacts whether or not an individual will select that program, service, or product in the future. In the case of educational program s, the post-purchase assessment will impact whether or not the participant would register for a subsequent course at the same institution, a critical element in examining participant dropouts.

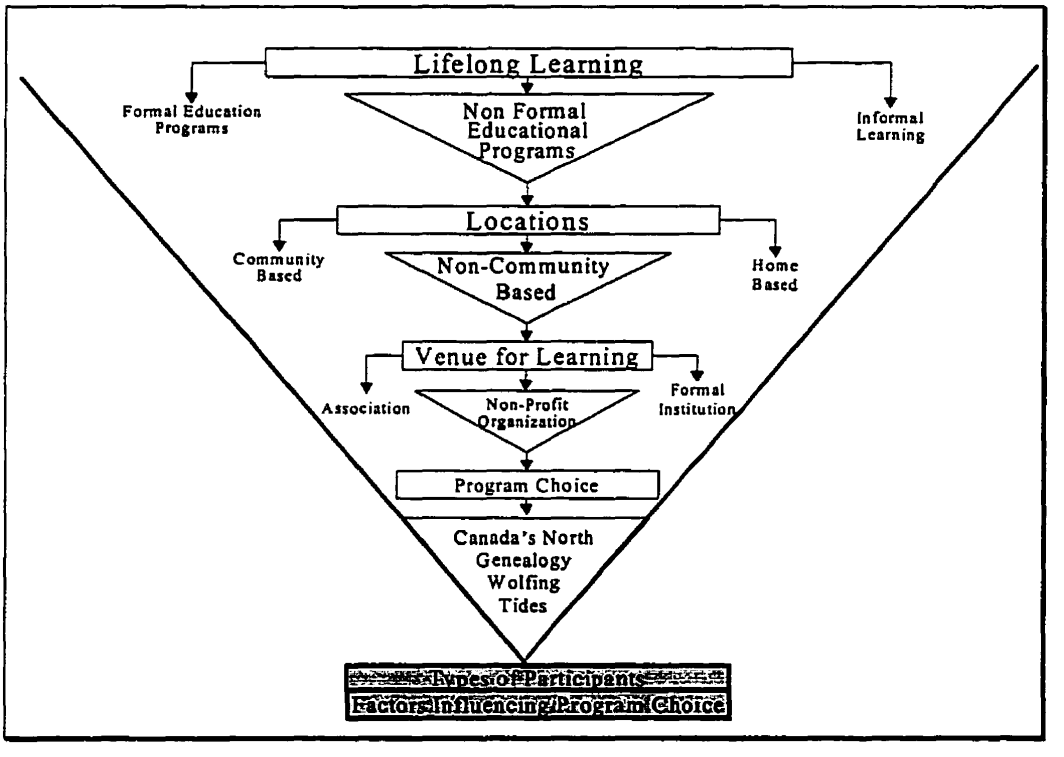
This consumer decision process can be transferred into an older-adult educational context with relative ease. To visualize this process, the researcher constructed the Educational Program Choice Funnel (Figure 7). The example uses older adult learners who ultimately select an educational-travel program. The educational program choice funnel begins with one fundamental assumption, learning is a lifelong process.

To begin, a person must recognize a need or interest to learn and act upon these internal motivators by deciding to enrol in an education program. The market search involves gathering program or course information from the various organizations and institutions offering attractive learning opportunities and bringing to the fore, information in ones memory. Based on a set of personal criteria, the information is evaluated and a program and venue for learning identified. The post-purchase assessment begins to occur during, and concludes upon, reflecting on the outcomes of the experience.

In this example, the motivated learner chose to satisfy her or his learning need by enrolling in a non-formal education program. The next decision concerned location. The location options available to the participant included a community-based program (e.g. Institute for Learning in Retirement), a home based program (e.g. distance education course), and a non-community based program (educational-travel). This decision taken, the next step is to select an

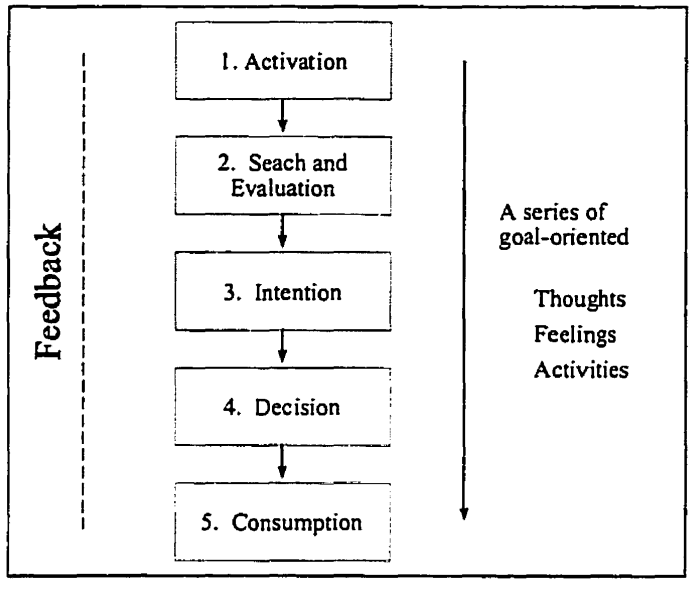
appropriate venue for learning, be it from an independent association who may be hosting a conference, a not-for-profit organization, such as Elderhostel, or a university exchange program in a foreign country. This decision complete, the participant can then focus on program selection. The final program choice will be influenced by the participant's personal motivation to enrol as well as the combined attributes of the venue and program. Additionally, if the participant plans to attend with a companion, the needs and wants of their travel companion(s) with be factored into the final choice. This is a linear view of the how the decisions related to educational choice can be funnelled, but it is just one example. Appendix A provides an alternate example based on selecting a university and a degree program.

**Figure 7 The Educational Program Choice Funnel**




A second consumer behaviour model that was of value in this study was Kindra, Laroche and Muller's (1994), illustrated in Figure 8. In this model, acquiring and consuming an economic good is described as a five-step process. Similar to Walters and Bergiel (1989), the first stage (activation) begins when the mental events, associated with a perceived need, are strong enough to prompt the person to act.

**Figure 8 The Five Stages in the Process of Acquiring and Consuming an Economic Good**

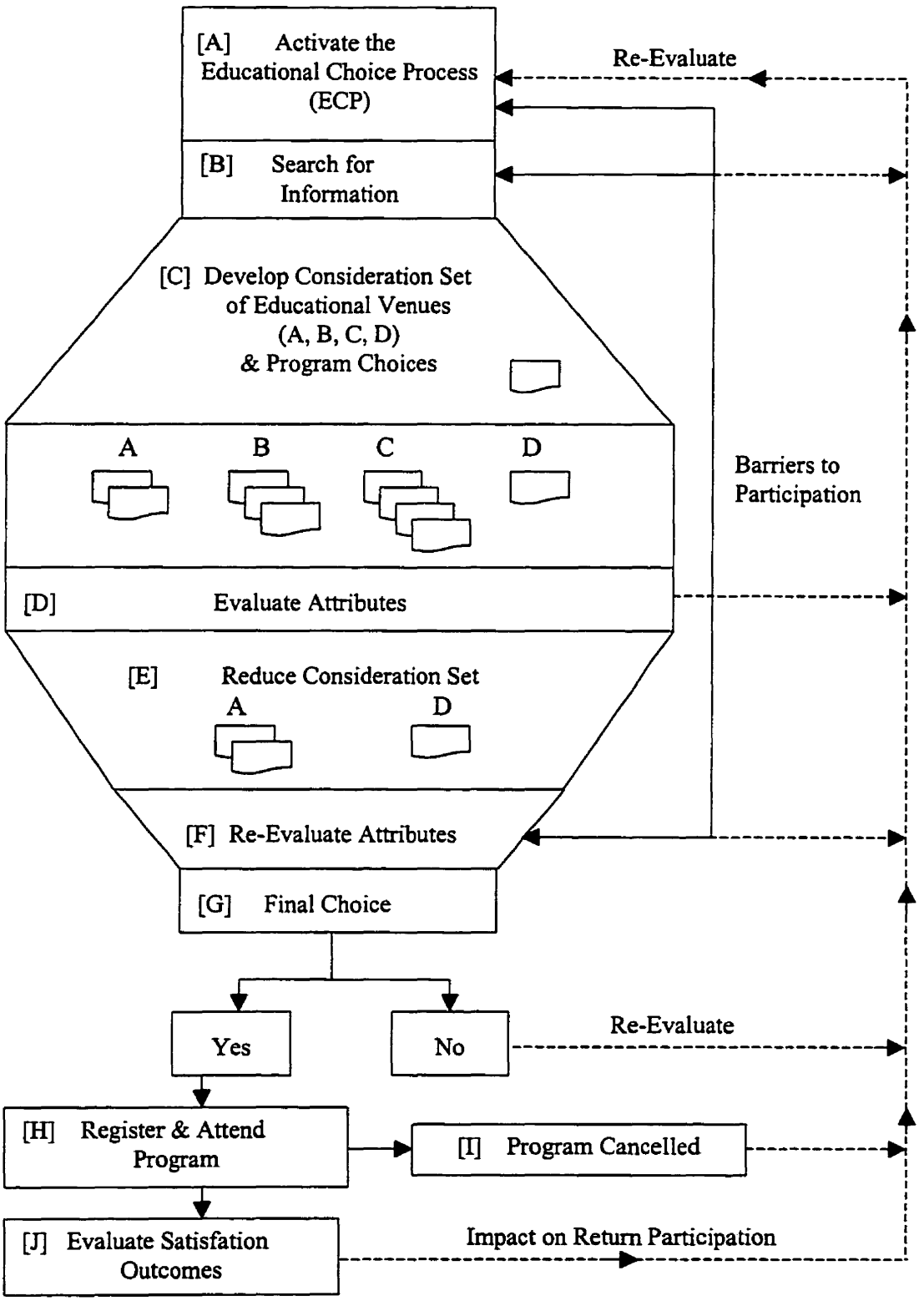



Source: Kindra, 1994, p. 8.

The second stage (search and evaluate) begins by reviewing the options stored in internal memory (e.g. Elderhostel, TraveLearn, University sponsored educational-travel program). If a person doesn't have enough information, external sources of information are gathered to supplement the consumer's knowledge base (e.g. catalogues, brochures, and recommendations from friends). The third stage (intention) is where the "consumer has zeroed in on what is felt to be a suitable good – because it appears to have the desired attributes that will satisfy the need – and is ready to make a decision" (Kindra et al., 1994, p. 9). The fourth stage (decision) refers to the point in the process when the consumer good is acquired (e.g. participant enrols in a specific course). The final stage (consumption) is when the purchaser makes mental notes of how well the product or service meets their needs. Similar to the internal and external forces in the Walters and Bergiel model (1989), there are forces in this model that continually impact the process: thoughts, feelings, activities, and feedback.

Selecting an educational program is like any other consumer decision, "it is a mental process of choosing the most desirable alternative from among those available" (Walters & Bergiel, 1989, p. 372). As the researcher did not locate a model that described the educational choice process to her satisfaction, one was created. Figure 9 diagrams the Educational Choice Process (ECP) which synthesizes the major components of both consumer behaviour models previously discussed and place then within an educational context.

**Figure 9 The Educational Choice Process (ECP)**



The Educational Choice Process is a model that begins, like the consumer behaviour models presented, with a need, interest, or desire to participate in an educational program [A]. It is here where the decades of motivation participation research in adult education and travel are most valuable because they provide valuable insight concerning the needs, perceptions, motives, and attitudes of participants. Unfortunately few adult education studies go beyond this point, which seriously limits a complete understanding of the participation cycle; a limitation which is all the more devastating in a world where educational budgets are shrinking and competition for students is rising. It is imperative that educational institutions understand the entire educational choice process and not remain tied to research that continues to focus on the inputs (motivations), outputs (satisfactions) and deterrents.

The search for information stage [B] involves reviewing information in memory and accessing new information required to make an informed choice of educational venue and specific program of study. This is a learning process whereby the participant gathers information to equip himself or herself with the knowledge required to make an informed choice. Because humans are only capable of processing a finite number of alternatives (Robertson & Kassarjian, 1991; Walters & Bergiel, 1989; Yoon & Hwang, 1995), identifying a limited number of options (known as the consideration set) is a natural part of the decision-making process.

Once a participant has the information he or she feels is necessary to select a venue and program, the consideration set of alternatives is developed [C]. For certain participants, such as the Content-Committed Elderhosteler (Arsenault, 1996), deciding upon a topic of study will take precedence over the location, for others (e.g. the Geographical Guru), the location will be a priority, the program secondary. Evaluating the attributes of each consideration set [D] will be based on a plethora of factors, such as the cost, location, availability, reputation of the institution, time of day, or the needs of a learning companion, to name a few.

Once the attributes for each item in the original consideration set have been evaluated [D], a reduced set is created [E] and this smaller set of program (and/or venue) options are re-evaluated [F] prior to making the final program selection [G]. If the participant chooses to enrol [H], he will register for the program of his choice, and barring no unforeseen circumstances, attend. However, if the course is cancelled, due to insufficient numbers of registrants [I], or the participant chooses not to enrol, the person will most likely reflect on the decision process to determine if he should try and find another option, defer participation until a later date, or decide

not to participate all together. The literature on the deterrents to participation in adult education is useful here in identifying variables associated with part of the educational choice process.

Finally, while participating in the program and after, reflecting on the experience, the registrant will evaluate their satisfaction by comparing it against their original expectation [J]. The outcome of this assessment will impact whether or not the participant will enrol in additional courses, in the same program, or with the same institution.

The Educational Choice Process has been presented as a linear model, which arguably has limitation because like any process, the impact of internal and external forces, will inevitably require that certain elements in the process be addressed at different times. The purpose however, for this model was to create an initial framework better understand the educational choice process and examine, where existing literature, could be of value feeding into this process. The majority of the adult education motivation and participation literature contributes value to steps [A] and [J]. The deterrent and barriers to participation literature by various researchers such as Boshier (1973), Cross (1992), Darkenwald & Merriam (1982) Scanlan & Darkenwald (1984) contribute most to understanding the re-evaluation element in this diagram. The findings from this study add value to understanding the factors that impact the educational-travel participant during steps [C], [D], [E], [F] and [G] .

## 2.7 Research Questions

The purpose of this study was to examine the factors influencing the choice of an educational-travel program and to determine if the typologies, reported in the adult education and travel literature, adequately describe the educational-travel participant. To this end, three major research questions were asked.

1. Do the typologies reported in previous research adequately describe the older adult educational-travel participant?

    1.1 Do participants tend to represent pure or blended types?

    1.2 Which participant types are dominant?

2. What are the critical factors influencing older adults in their choice of an educational-travel program?

   2.1 Which of the factors influencing program choice are most important to the total study population?

3. Which factors influencing program choice are most important to different types of participants?

   3.1 How strong is the relationship between the program choice factors and each participant type?

   3.2 How strong is the relationship between the program choice factors and each demographic variable: gender (male/female), country (Canada/USA), enrolment (new participant/ return participant), and attendance (attend alone/attend accompanied)?

   3.3 Which factors influencing program choice best discriminate each participant type?

   3.4 What are the patterns of interaction between the types of participants, the factors influencing program choice, gender and country?

## 2.8 Summary of the Literature Reviewed

The social context, the demographic profile of older adults, and the increasing interest in learning in retirement have all led to the need to better understand people who want to continue learning in retirement. As the 21st century approaches, providing for the varied learning needs of an older adult community is no longer an option, it is essential given the burgeoning population of older adults. There is no turning back from the realities of the 1980s, when hundreds of new educational programs for retirement-age people were launched and a new generation of retirees turned up to register for educational programs offered by colleges, universities, churches, synagogues, hospitals, libraries, senior centres and even department stores, (Manheimer et al., 1995, p. 1). These pioneer programs demonstrated the powerful role that learning in retirement can play in fulfilling a variety of older adult needs. As Clough (1992b) wrote "participation in learning activities is an essential strategy for meeting the multiple demands of ageing and for accessing opportunities for growth and development" (p. 147). One of the organizations who have developed programs that have successfully met the learning needs of a niche market is Elderhostel; an organization that offers educational-travel programs to older adults.

The purpose of this literature review was to describe the social context that led to educational-travel becoming a viable option for older adults, discuss the typologies of the adult learner and pleasure traveller, identify the factors influencing program choice, and open the door to understanding educational program choice from a consumer behaviour perspective. A summary of the major authors cited in this review of literature is presented in Table 6.

**Table 6 Summary of the Literature Reviewed**

| Contribution | Author(s), Date |
|---|---|
| Introduction and the Social Context | |
| The Age of Ageing and Demographics | Foot, 1996; Heil & Marks, 1991; Levy, 1992; Longino, 1994; Martin & Preston, 1994; Moore & Rosenberg, 1997; Statistics Canada, 1997a,b; United Nations, 1994; U.S. Bureau of the Census, 1996a |
| The Role of Education and Lifelong Learning | Cross, 1992; Havighurst, 1976; Heil & Marks, 1991; Ironside, 1989; Manheimer et al., 1995; Merriam & Caffarella, 1991; Ray et al., 1983; Selman & Dampier, 1991 |
| The Evolution of Adult and Older Adult Education and Programs for Older Adults | Adair & Mowsesian, 1993; Arsenault, 1996; Arsenault & Anderson, 1993; Clough, 1992a Cross, 1992; Elderhostel Inc, 1998; Harold, 1992; Havighurst, 1969, 1976; Heil & Marks, 1991; Hiemstra, 1972; Knowlton, 1977; Lengrand, 1989; Manheimer et al., 1995; Merriam & Caffarella, 1991; Mills, 1993; Moschis, 1992; Muller, 1994; Novak, 1987; O'Connor, 1987; Pearce, 1991; Queeney, 1995; Romaniuk & Romaniuk, 1982; Selman & Dampier, 1991; Smith, 1995; Verschueren, 1995; Wirtz & Charner, 1989 |
| Leisure and Education | Arsenault, 1998; Arsenault & Anderson, 1998; Cross, 1992; Goodale & Witt, 1985; Manheimer et al., 1995; Sessoms, 1984; Swedburg, 1992 |
| Travel and Education | Adamson & Brobyn, 1994; Arsenault, et al., 1997; Anderson, 1989; Bodger, 1994, 1997b; Canadian Tourism Commission, 1997; Crompton, 1979; Dann, 1997; Etzel & Woodside, 1982; Fisher & Price, 1991; Fodness, 1994; Gibson, 1994; Gnoth, 1997; Li-Jiuan, 1997; Lue, 1992; McCourt, 1989; Muller, 1994; Myers & Moncrief, 1978; Waters, 1989 |
| Segmenting Markets Using Typologies | |
| Market segmentation and typology related research | Arsenault, 1996; Bailey, 1994; Boshier, 1971; Boshier & Collins, 1985; Calantone & Johar, 1984; Cohen, 1972, 1979; Crompton, 1979; Cross, 1992; Dann, 1981; Etzel & Woodside, 1982; Houle, 1961; McQueen & Miller, 1985; Mo et al., 1993; Moschis, 1992; Patton, 1990; Shoemaker, 1989; 1994 |

| Contribution | Author(s), Date |
|---|---|
| Factors Influencing Program Choice | |
| Four profile studies | Arsenault, 1996; Boshier, 1991; Crompton, 1979; Romaniuk & Romaniuk, 1982 |
| Enrichment & Knowledge | Boshier, 1971; Clough, 1992a; Crompton, 1979; Cross, 1992; Dann, 1981; Etzel & Woodside, 1982; Fisher, 1986; Fodness, 1994; Havighurst, 1969; Houle, 1961; Maslow, 1954; Merriam & Caffarella, 1991; Morstain & Smart, 1974; Muller, 1994; Ostiguy et al., 1994; Roberto & McGraw, 1990, Wirtz & Charner, 1989 |
| Equilibrium | Bass, 1986; Boshier, 1971; Carp et al., 1974; Crompton, 1979; Dann, 1981; Fisher & Price, 1991; Henry & Basile, 1994; Mannell & Iso-Ahola, 1987; Morstain & Smart, 1974; Woodside & Jacobs, 1985 |
| Family & Friends | Boshier, 1991; Crompton, 1979; Kindra et al., 1994; Manheimer et al., 1995; Muller, 1994; Quintern-Reed, 1992; Sage Group, 1993; Shoemaker, 1989; van Harssel, 1994; Vandersluis et al., 1994 |
| Limitations | Arsenault, 1996; Cross, 1992; Darkenwald & Merriam, 1982; Johnstone & J., 1965; Ostiguy et al., 1994; Selman & Dampier, 1991; van Harssel, 1994 |
| Pragmatic Influences | Arsenault, 1996; Henry & Basile, 1994; Ostiguy et al., 1994; Rice, 1986; Romaniuk & Romaniuk, 1982; Selman & Dampier, 1991 |
| Purposeful | Boshier, 1971, 1989, 1991; Carp et al., 1974; Cross, 1981, 1992; Havighurst, 1969; Hiemstra, 1976; Houle, 1961; Merriam & Cafarella, 1991; Morrison, 1994; O'Connor, 1987; Selman & Dampier, 1991; Shoemaker, 1989; van Harssel, 1994; Vandersluis et al., 1994; Wirtz & Charner, 1989 |
| Social | Arsenault, 1996; Boshier, 1971, 1991; Carp et al., 1974; Cohen, 1972; Crompton, 1979; Cross, 1992; Henry & Basile, 1994; Houle, 1961; Merriam & Caffarella, 1991; Mills, 1993; Morstain & Smart, 1974; Quintern-Reed, 1992; Rice, 1986; Romaniuk & Romaniuk, 1982; Wirtz & Charner, 1989 |
| Unique | Crompton, 1979; Etzel & Woodside, 1982; Rice, 1986; Romaniuk & Romaniuk, 1982; Vandersluis et al., 1994 |
| A Consumer Perspective | Kindra et al., 1994; Robertson & Kassarjian, 1991; Walters & Bergiel, 1989 |

# CHAPTER III: METHODOLOGY

## 3.1 Introduction

The primary purpose of research is to explain (Gall, Borg, & Gall, 1996), however, there is no yellow brick road that all social science researchers will follow to explain the world in which we live. Just as different vacationers take planes, trains, and automobiles to travel to common holiday destinations, researchers may use a variety of methodological approaches, grounded in different epistemological assumptions, to investigate, examine, and explain phenomena.

To determine the major factors associated with selecting an Elderhostel program, and to develop a typology of the older-adult educational-traveller, methodological flexibility was deemed important. Patton (1990) and Anderson (1998) advocate, as does this researcher, that one should take advantage of the multiple methods of inquiry available to today's research community and examine phenomena from different perspectives in an effort to strengthen and deepen our overall understanding. Therefore, the *paradigm of choices* which "rejects methodological orthodoxy in favour of *methodological appropriateness*" (Patton, 1990, p. 39) was adopted as the most appropriate paradigm to study this relatively unexplored topic.

The purpose of this chapter is to describe the methodology. More specifically, this chapter first discusses the research design and presents the research plan that includes, data collection, a description of the target population, sampling, external validity, and research approvals. The remainder of the chapter discusses instrumentation, data analysis, and concludes with the limitations of the study.

## 3.2 Exploratory Design

Exploratory designs enable investigators to conduct research aimed at identifying and crystallizing issues, assess if the lines of inquiry are worth continuing, and if so, developing hypotheses for future research (Kindra et al., 1994). As the study of educational-travel with older adults is in its infancy, an exploratory approach provided an appropriate framework to allow the researcher to benefit from the strengths of both qualitative and quantitative methodologies. By planning her graduate level research as two separate studies (masters and doctoral), the

researcher was able to examine the phenomena from two perspectives and use different research methodologies. As Table 7 summarizes, the masters level research sought to describe, this doctoral study sought to explain, and ideally a post-doctoral study would attempt to generalize the findings.

**Table 7 Levels of Research**

| Learning Level | Purpose of Research | Methodology |
|---|---|---|
| MA | To describe | Primarily Qualitative |
| Ph.D. | To explain | Primarily Quantitative |
| Post-Doctoral | To generalize | Methodological Mix |

Grounded in a phenomenological perspective, the MA study used focus groups, in-depth interviews, and participant observation to collect data (Arsenault, 1996). As little is known about which factors influence older adults when they select an educational-travel program, starting this line of inquiry with a qualitative study allowed the researcher to collect information on the topic without predetermined categories or targeted outcomes. The MA study did not rely exclusively on qualitative methods, however, it also included a small demographic questionnaire which proved to be extremely useful during the analysis. In the end, the first study identified 14 factors that influence educational program choice. It also revealed six different types of participants, the need to expand the conceptual framework and investigate new directions in the literature, and it generated specific research questions on which to build the doctoral study.

To collect the data for the doctoral study a questionnaire was chosen. This decision was based on a variety of reasons. First and foremost, the researcher wanted to continue the line of inquiry by using an alternative research method. By collecting data that could be statistically analyzed the researcher was able to investigate the factors influencing program choice and examine the strength between select population characteristics and the decision factors. Second, questionnaires are a common research tool in today's world. They permit data to be collected in a timely fashion and, if constructed properly, can yield valid and reliable results (Anderson, 1998). It also furthered a personal learning goal, to develop additional methodological skill. Third, the target population was widely dispersed throughout Canada and the United States. In order to determine if the findings of the first study could be internally valid, a large representative sample was required. Finally, questionnaires are a relatively inexpensive means of

collecting large amounts of data (Anderson, 1998; Kindra et al., 1994; Neuman, 1997), another important consideration for graduate level research. Finally, since Elderhostelers have a good reputation for filling out their questionnaires (O'Connor, 1987; Ostiguy et al., 1994; Rice, 1986; Roberto & McGraw, 1990; Romaniuk & Romaniuk, 1982), there was little fear of a poor return.

To develop the questionnaire, the researcher wanted to involve older adult learners in the process. To this end, select groups of Elderhostel participants and members of McGill University's Institute for Learning in Retirement were invited to contribute and critique to this phase of the study. The decision to mail questionnaires, rather than telephone participants or distribute them in person, was also based on the recommendations from these older adult learners. Indeed, because a number of these people had enjoyed academic or research careers themselves, they were an ideal source of insight and feedback that ultimately increased the validity of the questionnaire. The researcher was also sensitive to the age difference between the study population and herself and felt it was important to involve older adults in developing the questionnaire to ensure that the phraseology, stylistic conventions, and visual presentation were appropriate for their generation (Moschis, 1992; Neuman, 1997).

## 3.3 The Research Plan and Procedures

All large research projects can be enhanced by planning (Anderson, 1998). Table 8 presents the major activities and timelines for the study.

**Table 8 The Research Plan**

| Timelines | Major Activities |
|---|---|
| Dec 96- Apr 97 | Design the study, obtain approvals and funding |
| May 97 | Develop the instrument |
| June 97 | Pilot and revise the instrument |
| July 97 | Finalize and produce the instrument |
| Aug 97 | Draw the sample, distribute the questionnaires |
| Sept 97 | Begin data entry, follow-up on non-responses |
| Oct 97 | Preliminary analysis, workshops with organizational members |
| Nov 97 - Feb 98 | End data entry and analysis |
| Mar - Jun 98 | Write dissertation |

### 3.3.1 Data Collection

The study used a printed questionnaire, distributed by mail, to collect data. The strengths of mailed questionnaires are that they are affordable, can be conducted by a single researcher, permits easy follow-up, can reach people in a large geographic area, and offer anonymity (Anderson, 1998; Neuman, 1997). Neuman also writes that questionnaires sent to well-educated target populations or groups with a high level of interest in the topic often receive high response rates, which is the case with Elderhostelers (Rice, 1986; Romaniuk & Romaniuk, 1982). The general disadvantages of questionnaires may be: low response rates, mail delays, questions are often left unanswered, it's possible that respondents may misunderstand the questions and are unable to ask for clarification and, there is little room for contextual questions. Finally, the researcher has no control over who answers the questionnaire or under what conditions. There is however, no perfect research design or data collection instrument (Patton, 1990) so the task is to maximize the potential and minimize the limitations.

Each participant in the study received, in the mail, a package that included the questionnaire (Appendix B), an informed consent form (Appendix C), a return stamped envelope, and a cover-letter from Elderhostel Canada (Appendix D), and a cover-letter from the researcher (Appendix E). In addition, a recall postcard (Appendix F) was mailed one month later to registrants who had not yet responded.

### 3.3.2 The Target Population

Elderhostel participants living in Canada and the United States formed the target population for this study. Participants from other educational-travel programs were intentionally not included in this particular study because it was the first attempt at explaining the phenomena based on the qualitative findings from the MA study. For this reason it was important to remain with the same target population. A second important factor was that Elderhostel Canada found value in findings from the MA study and they supported furthering the investigation with the researcher. In particular, the MA study resulted in one presentation and one workshop with the Elderhostel Board of Directors, and four workshops with the Elderhostel Regional Directors and their site co-ordinators, and a presentation at an international conference.

### 3.3.3 The Sample

The sample population was drawn from the total pool of participants who had enrolled in a Fall 1997 Elderhostel Canada program during the first seven weeks of the registration period. A large sample base was important for the multivariate analysis was planned. Stevens (1996) and Kerlinger (1986) recommend, as a minimum, five subjects per number of items in a factor analysis. The minimum acceptable sample would have been 52 items x 5 subjects/item = 260. However, when this study was originally conceived, the multivariate analysis was planned based on 14 decision-making factors x 6 participant types x 2 population characteristics (e.g. gender or nationality). If one extends the 5 subjects/cell recommendation, the minimum sample would be 840 (14 x 6 x 2 x 5 ). In consultation with a quantitative research expert, it was decided to over sample and draw 1000 names.

Due to the confidential nature of the Elderhostel participant data base files, the researcher required approval from both the Executive Director of Elderhostel Canada and the President of Elderhostel (the USA organization) to obtain the sample and access specific demographic information. The items that were requested and approved included the participant's name, address, phone number, age, and gender, as well as the program name, location and dates.

In total, 999 names were received, however 36 represented people who had registered for more than one program during the October to December 1997 period. As the instructions on the questionnaire asked people to respond based on their **most recent** registration, those who appeared on the sampling list twice received only one questionnaire. In the end, 963 surveys were mailed; 405 within Canada and 558 to the United States.

### 3.3.4 The Sampling & Questionnaire Distribution

To permit the findings to be generalized within Elderhostel, the researcher requested a random sample be drawn from the total pool of possible registrants. It was also important that the sample be drawn as close as possible to the time people registered because "decades of research on human memory reveal that reconstructions are based on information immediately present" (Carroll & Johnson, 1990 p. 34). Because of this fact, it was important to gather information close to the time people registered but **before** they participated in the program to ensure that participation did not affect a person's recollection of why the program was originally chosen.

The researcher, unable to draw the sample (because of the confidential nature of the database), made appropriate arrangements with Elderhostel Inc. to draw the 1000 person sample. The importance of obtaining a random sample was explained and, having received assurances that the computer system had the capacity to do this, the researcher trusted the process. Alas, despite good intentions, the process went awry.

Communications with the Elderhostel Canada Executive Director revealed that typically, 80% of the fall registrations are received within seven weeks (5 weeks mail registrations + 2 weeks of mail and phone registrations). He also estimated that the fall registration would include approximately 3000 Elderhostelers. To allow the sampling pool to grow without stretching the timelines too long, the date to draw the sample was set for seven weeks after the opening of registration. The plan was to download the database on disc, forward the disc by courier, then within four days, customize the cover letters, code and mail the questionnaires (Table 9).

**Table 9 Sampling Time Lines**

| 1997 | Activity | Impact |
|---|---|---|
| 24 June | Fall mail registration period begins | Contact people as close to registration time as possible, allowing for a set period of time for registrations to be received |
| 29 July | Fall phone registration period begins | |
| 11 Aug | Draw 1000 names from those registered to date; Same day courier to deliver the data disc from Boston, MA to Montreal QC | Typically 80% of fall applicants are normally registered by this time |
| 12 Aug | Disc did not arrive, inquiries made | Unable to prepare distribution labels |
| 13 Aug | Problem discovered, disc sent via courier from Boston | Scheduled distribution date 2 days away |
| 14 Aug | Disc arrives, data base separated into Canadian and American addresses, labels prepared | 36 hours until targeted distribution date, 2 days before the researcher leaves the country for 10 days |
| 15 Aug | Envelopes completed, travel to the USA to mail American questionnaires, mail Canadian ones locally | Deadline met |
| 15 Sept | Follow-up card sent to 240 participants, begin data entry | 75% returned to date |
| 30 Sept | Preliminary analysis revealed sampling error, inquires were made, and the error in drawing the sample was discovered. | Threat to external validity within Elderhostel |
| Oct | Fall Programs Begin | |

The unexpected delay in receiving the database meant that the questionnaires were addressed as quickly as possible and mailed immediately to remain on schedule. Prior to mailing, the only check the researcher performed on the participant mailing list was to identify registrants who were enrolled in more that one program during the October through December months. Because the questionnaire asked people to respond based on their most recent registration, those who had registered for more than one session received just one questionnaire. This reduced the total number of surveys available for distribution to 963.

Once the completed questionnaires began to arrive and the researcher sorted the database by province to begin tracking the returns. It was at this time the researcher noticed that questionnaires were only mailed to participants in 7 provinces rather than 10. This struck her as odd because she had been promised a random sample of participants from all provinces and territories in Canada (Table 10). A quick review of the program catalogue confirmed that there were no programs in Saskatchewan, the Northwest Territories, and only one program in Prince Edward Island so one could not expect registrations from these areas. However, there were 30 program weeks in Quebec and not one participant was in the sample. This caused the researcher to return to the individual who drew the study sample to find out if there had been an error in extracting the sample; there had been. Due to an arbitrary decision by an organizational staff member, rather than extract a random sample, the computer was programmed to extract the first 1000 names from the database. Because their database is organized alphabetically by province, the researcher received 100% of the names of participants enrolled in Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Nova Scotia, and most of the participants in Ontario. As Quebec was the 'next letter in the alphabet', and the 1000 quota was full, the computer stopped extracting names before reaching Quebec participants

Discovering this error **after** the questionnaires had been mailed was a great concern to the researcher. In deliberation with her academic advisor, two options were discussed. The first was to request a random sample of participants in Quebec and Prince Edward Island (the provinces that had not been included in the original sample) and contact these individuals. However as the error was only discovered at the end of September, it was too close to the course time to obtain a new random sample of names, prepare more questionnaires and send them via surface mail. By the time the questionnaire would arrive at the homes of some participants they would have already finished their course, others would be participating when the questionnaire arrived at their home address, and some would be enroute to their Elderhostel program. Because

participation alters recall (Carroll & Johnson, 1990), it was important to query respondents as close as possible to the time when they made their program choice, a second mail-out to participants would mean they would receive their questionnaire several months after they made their program choice (compared to the maximum of seven weeks in the original sample). The second option was to continue with the original sample. This option was selected for it represented a lesser threat to validity. Despite the fact that participants in two provinces were not included in the sample, the study population still represented 70.4% of the **total** number of participants enrolled in a fall program in Canada. Consequently, the findings of the study can be generalized to all North Americans enrolled in an Elderhostel Canada program except those enrolled in PEI and Quebec.

**Table 10 The Sample**

| Province | Number of Program Weeks in Catalogue | # Enrolled as of 8th Aug | # Enrolled as of 15th Aug | 11th Aug Sample Received[1] | Number of Questionnaires Returned |
|---|---|---|---|---|---|
| Alberta | 21 | 228 | 243 | 233 | 179 |
| British Columbia | 20 | 214 | 235 | 220 | 174 |
| Manitoba | 5 | 127 | 129 | 127 | 116 |
| New Brunswick | 9 | 68 | 76 | 67 | 51 |
| Newfoundland[2] | 0 | 0 | 0 | 0 | 0 |
| Nova Scotia | 12 | 135 | 153 | 135 | 115 |
| Ontario | 31 | 320 | 338 | 217 | 176 |
| Sub-totals | 74 | 1092 | 1174 | 999 | 811 |
| Prince Edward Island | 1 | 17 | 23 | 0 | -- |
| Quebec | 30 | 215 | 232 | 0 | -- |
| Saskatchewan/ North West Territories[2] | 0 | 0 | 0 | 0 | -- |
| **Totals** | **129** | **1324** | **1429** | **999[1]** | **811** |

[1] Out of 999 names received, 36 were duplicates and therefore only 963 questionnaires were mailed.

[2] No courses were offered in these locations during the Fall 1997 semester.

### 3.3.5 Rate of Return

Consistent with Kindra, Laroche and Muller's (1994) recommendations for increasing mail questionnaire response rates:

1. The questionnaire was kept short (10 to 15 minutes to complete);
2. Participants were offered a synopsis of the survey results (73.7 % expressed interest);
3. A stamped return envelope was provided;
4. Four weeks after the original mailing, a reminder postcard was sent to participants whose questionnaires had not been received; and
5. An incentive was offered -- the opportunity for one respondent to receive a free program registration with Elderhostel Canada. This type of incentive was suggested by the researcher and deemed acceptable by the organization. At the completion of the study, the researcher randomly drew a name and Elderhostel Canada made the arrangements with the participant.

The researcher also followed up on all incomplete questionnaires. Each participant who forgot to fill out the informed consent form (7) or left pages of the questionnaire-unanswered (17) were recontacted. A personalized letter requested the participant to provide the missing information and 100% Cupertino was received. This formula proved successful for the **overall rate of return was 84.2%** (963 mailed questionnaires/811 returned) representing an 81.7% return from Canadian addresses and 86.0% from American addresses.

### 3.3.6 External Validity

Elderhostel participants have been used as research subjects in a wide range of studies including problem solving, attitudes toward nuclear threat, life satisfaction, the study of reading habits, self-directed learning readiness, environmental awareness, science literacy, elite status, food intake, working models for educating older adults, and learning styles (Quintern-Reed, 1992). Despite the attractiveness of using Elderhostelers as a research population, Quintern-Reed cautions that they represent an elite community of older adults, one characterized by an above average level of education, a caution echoed by certain faculty members at McGill University.

While it is true that the typical Elderhostel participant has at least a college education, an above average income, good health, (Mills, 1993; Odyssey, 1995) and represents only a small cohort within the total population of adults aged 55+ (Heisel, Darkenwald, & Anderson, 1981); it is this researchers position that they make an ideal study population for examining the factors that influence the choice of an educational program because:

1. The number of return participants is high (Arsenault, 1996; Rice, 1986; Romaniuk & Romaniuk, 1982);
2. Elderhostel participants represent a small but growing segment of society who are well educated, affluent, retired and represent a market of recreational learners. Based on the increasing numbers of baby boomers who have a higher level of post secondary education than their parents, demographers predict that members of society who fit this profile will increase throughout the next century (Foot, 1996);
3. Homogeneous samples permit more exact theoretical predictions than heterogeneous samples and increase the sensitivity of identifying significant relationships (Heischmidt, 1992; Lue, 1992);
4. The majority of Elderhostel participants are women (Mills, 1993) and this constitutes one of the fastest growing segments in the lifelong learning movement (Cross, 1992). Considering the relative absence on research with older adult women in general, by including gender as a variable in the multivariate and demographic analysis (knowing they represent approximately 70% of the participant base), this study will help, on some level to contribute to this void in the literature;
5. Elderhostel participants have a reputation for filling out their questionnaires and participating in research projects (O'Connor, 1987; Rice, 1986; Roberto & McGraw, 1990; Romaniuk & Romaniuk, 1982). One could speculate on several reasons for this type of enthusiastic support. First, they represent a segment of the population that values learning and may feel that, by participating in research projects, they are making a valuable contribution to society. Second, these people are retired and may have time to fill out questionnaires. Third, many of them possess graduate degrees (Elderhostel Inc., 1994), and may feel an affinity towards helping the next generation of developing researchers; and

6. Few research initiatives have been devoted exclusively to the education of older adults in an ageing society (Thornton, 1992) and a strong need exists to expand research in this area (Jean, 1994).

Furthermore, if one wants to understand the total phenomenon of older adults who enrol in educational-travel program, as Houle (1961) wrote, "we must begin by understanding the nature, the beliefs, and the actions of those who take part to the highest degree" (p. 10), in which case Elderhostel makes an ideal study population.

This researcher believes that programs that combine education and travel will continue to rise in popularity as the proportion of educated retirees' increases throughout the next century. Patricia Cross (1992) notes, "the boom market in adult education is to be found in education for leisure and recreation rather than in job-related education" (p. 22).

## 3.3.7 Approval of the Research Procedures and Materials

The Ethics Review Committee of the Faculty of Education, McGill University (Appendix G), the researcher's doctoral committee, and the Executive Director of Elderhostel Canada approved the research procedures for this study. Permission to access Elderhostels' confidential database was granted by the President of Elderhostel Inc. The researcher guaranteed, in writing, to keep the participants names and addresses confidential. Each participant confirmed their voluntary willingness to participate in the study by signing an informed consent form (Appendix C) guaranteeing their anonymity and giving the researcher permission to use the data they provided. Anonymity at McGill University means that only the researcher knows which participants returned their questionnaire, for it is a requirement of the university to be able to track each questionnaire received back to the person who filled it out.

### Relationship between the Researcher and Elderhostel

The researcher's relationship with Elderhostel Canada has been exclusively as a graduate student with no professional or volunteer association with the organization. Elderhostel Canada provided financial support for this study for costs directly related to developing, producing, distributing, and analyzing the questionnaire. Funds were also provided to cover stationary costs, to acquire a license for the statistical software, and to pay for long distance telephone calls, faxes and Internet searching related to the study. There was no honorarium paid to the student for

conducting this research and Elderhostel Canada gave the researcher complete academic freedom to conceptualize the study and conduct the research according to the directions provided by the students doctoral committee.

## 3.4 The Instrument

This study required an instrument that could collect data on the types of participants and the factors related to choosing an educational-travel program. A review of numerous studies reported in the adult education, educational gerontology, and the travel research journals provided clues and suggested various foci that were useful in framing the study (Boshier, 1971; Boshier & Collins, 1985; Clough, 1992a; Crompton, 1979; Fodness, 1994; Fujita-Stark, 1996; Henry & Basile, 1994; Jenkins, 1978; Lue, 1992; Mo et al., 1993; Morstain & Smart, 1974; Pearce, 1991; Pitts & Woodside, 1986; Rice, 1986; Roberto & McGraw, 1990; Romaniuk & Romaniuk, 1982; Scanlan & Darkenwald, 1984; Um & Crompton, 1990; Wirtz & Charner, 1989). Unable to locate an instrument that could meet the specific needs of this inquiry, the research opted to create an original instrument.

The first question in creating a new instrument was whether to seek breadth or depth. As this was an exploratory study the researcher chose breadth. The process began by establishing the key requirements for the questionnaire to ensure it was able to:

1. Gather information related to the participant's enrolment and activity histories to provide contextual information;
2. Determine if Arsenault's (1996) typology represented pure or blended types of participants;
3. Collect data that would bring enhanced understanding concerning the factors influencing program choice; and
4. Ask questions concerning joint decision-making as it pertains to program choice, for the majority of Elderhostel participants travel with a companion.

The instrument went through several developmental stages prior to reaching its final form (Appendix B). To begin, a draft questionnaire was constructed based on previous research in the areas of adult education and pleasure travel for adults of all ages. Then, the questionnaire was evaluated both qualitatively and quantitatively with a total of 154 older adult learners,

academic experts, and Elderhostel Canada staff members. Table 11 highlights the phases required to test and refine the instrument.

**Table 11 Questionnaire Development Phases**

| Phase | | Method |
|---|---|---|
| 1. | Assess the content and face validity of the draft questionnaire | Discussion groups with older adult learners; review by experts and Elderhostel Canada staff. |
| 2. | Determine if vignettes or a Likert scale would elicit better data | Pilot test with older adults, review by experts. |
| 3. | Refine and synthesize the decision-making items | Discussion groups with older adult learners, pilot test long version then factor analyze. |
| 4. | Final revisions | Expert review by academics, the Executive Director of Elderhostel Canada and the President of Elderhostel Inc. in the USA. |

### 3.4.1 Phase 1: Content and Face Validity

The purpose of Phase 1 was to assess the content and face validity and to 'debug' the draft questionnaire (Carroll & Johnson, 1990). Ten members from the McGill Institute for Learning in Retirement (MILR), two Elderhostel Canada volunteers, and one staff member were invited to participate in a verbal feedback process that encouraged a critical review of the questionnaire. The MILR members had all previously received training in questionnaire development and had conducted research on their own programs.

The questionnaire was mailed to each participant who was asked to fill it out at his or her leisure and record the length of time it took to complete. They were also encouraged to note any points concerning the readability, types of questions, and visual presentation, for this would form the basis for two group discussions that would follow. At the group meeting participants were invited to:

1. Critique the content, variety, and sequencing of the questions;
2. Provide feedback on the length, readability of the instructions, and the language level;
3. Comment on the readability and suitability of the vignettes;
4. Scrutinize the list of Likert items that would form the basis of the factor analysis;

5. Discuss the pros and cons of administering the questionnaire via mail, over the telephone, or in person at the program; and
6. Offer suggestions on how to improve the instrument's visual appearance.

This last item was particularly important because the sample population consisted of older adults who, between the ages of 50 and 70, begin to experience increased glare sensitivity, a loss of visual acuity, decreased contrast and colour sensitivity and a decline in the ability to focus on successive images (Moschis, 1992). Failing to address specific details, such as font size, paper colour, use of shading, bold, or italics, could have resulted in the participants having difficulty reading the questionnaire.

This first review of the questionnaire generated a tremendous amount of valuable information that led to revisions in the appearance, word changes on specific questions, clarity, length, and content of the final instrument. In particular the following points were stressed:

1. The importance of including open ended questions to allow respondents to provide personal comments, thus enhancing the qualitative value of the instrument;
2. Ensure the phraseology was appropriate for an educated population;
3. Keep the questionnaire short, a maximum of 15 minutes to complete;
4. Minimize the instructions, since seniors have been filling out questionnaires their entire lives;
5. Keep variety in the types of questions asked (e.g. fill-in-the-blank, long answer, Likert). The vignettes were described as a fun and informative way to gather information. By placing them near the front of the instrument it was felt people would be encouraged to complete the other sections;
6. Reduce the options in the activity history (Section 4) to one and three years, as opposed to asking people to recall the last year, 5 years ago, ten years ago;
7. Ensure the questionnaire had a professional appearance;
8. Recommended using a 14 point font (12 minimum) and an effective use of white space;
9. Avoid the use of italics, fancy headers with lines and colours; and

10. Use a mail questionnaire as on-site questionnaires were not favoured because it was agreed that this form of data collection is an imposition to participants when they have paid a fee to attend a program. Telephone surveys were dismissed by all, for as one elder shared, "Tele-marketers are always trying to scam seniors. We don't have time to waste talking on the phone, but a questionnaire could be done while riding on the bus or relaxing at home."

### 3.4.2 Phase 2: The Typology

To test the typology vignettes were chosen over Likert items based on the findings from two pilot tests and recommendations from both participants and experts. A vignette is a brief concise description that combine expressive and objective ideas and can be used to measure complex variables in realistic social and psychological situations (Kerlinger, 1986).

To test the vignettes, a pilot study was conducted that involved 44 participants (22 couples) who knew each other well by virtue of marriage or a long-standing friendship. Each participant was asked to read six vignettes that described the participant types identified by Arsenault (1996) then, on a 7 point Likert scale, indicate the extent to which the passage described herself or himself. Using the same vignettes and rating scale, participants then were asked to indicate how much the description sounded like their **partner**. Based on the advice from the doctoral committee chairman, a vignette was deemed valid and reliable (for exploratory research) if the self rating and partner rating were within +/- 1 on a 7 point Likert scale, 66% of the time.

Overall, the consistency between the self rating and partner assessment was higher than 66%, ranging from 70.5% to 90.9%, with one 43.2% exception (Table 12). This outlier concerned one of the experts and the researcher was asked to re-pilot the vignettes, breaking down the vignettes into smaller, less complex statements. The amended version was tested with a new group of 74 older adult learners, however the results deteriorated considerably. Based on these two pilot tests, plus the verbal feedback from participants and academic experts, the researcher returned to using six vignettes, as originally planned, but incorporating more effective descriptions based on the verbal feedback received. The 7-point Likert scale was also reduced to 5-points because it was unanimously agreed that the larger number of scale points did not add value. Appendix H presents the full results of the vignette pilot study.

**Table 12 Results of the First Vignette Pilot Test**

| Vignette | Adventurer | Experimenter | Activity-Oriented | Content-Committed | Opportunist | Geographical -Guru |
|---|---|---|---|---|---|---|
| % of respondents with a similar self & partner rating +/- 1 on a 7 point Likert scale[a] | 70.5 % | 72.7 % | 70.5 % | 43.2 % | 75.0 % | 90.9 % |

[a] n = 44

## 3.4.3 Phase 3: The Decision-Making Factors

Arsenault (1996) identified 14 factors influencing program choice. Each factor came with an elaborate description to illustrate all that was included when participants used a single word to describe, for example, location. As Table 13 illustrates, 'location' had several meanings to various participants.

**Table 13 Sample of the Complexity of the Factor Called 'Location'**

LOCATION:

*Those elements in the decision-making process that relate to the participant's desired destination and may include geographical attractions, area assets, feelings of nostalgia towards the area, or general curiosity about the location.*

| | |
|---|---|
| Geographical Attraction | Geology, flora and fauna, mineralogy, woods, sea shore, near water, mountains, attractive scenery, natural attractions |
| Area Assets | Local tourist attractions, family in the area or region, golf courses |
| Nostalgia | Have spent time in the area before, would like to return to a site, attending a reunion or reuniting with family/friends in the area, visit Alma Mater, married here, ancestors buried here |
| Curiosity | See a new part of the country, visit new country, general interest in learning about the area, always wanted to visit this location |

Source: Arsenault, 1996, p. 128

The initial list of 78 Likert items was created based on a synthesis of Arsenault's (1996) program choice factors and those found in the education and pleasure travel literature. Verbal feedback on each item was received during Phase 1 of the questionnaire review and, based on

these discussions, the list was reduced to 67 items. The shortened list was administered to 102 participants, and the results factor analyzed (Appendix I) the list of 52 items was finalized based on several sources of information including:

1. The results of the factor analysis which revealed 21 factors; items had to load at $\geq 0.60$;
2. The results of the Cronbach alpha coefficient, which provides a measure of the internal consistency of the items in an index. Items with low reliability coefficients ($\leq 0.60$) were re-evaluated based on their frequency in the literature and either deleted or, more items of an equal kind were added in an attempt to improve the reliability (Kerlinger, 1986);
3. The desire to ensure that all of the categories reported in Arsenault's (1996) study were included, in some form, in the questionnaire (not exclusively in the factor analysis section);
4. The frequency that certain items appeared in the literature; and
5. The participant's verbal and written feedback received during the final pilot-test.

In addition to the 52 Likert items, one open-ended item was included to allow participants to identify and rate any important factor they felt was missing. To assist in validating the factor analysis findings, two open-ended questions were included to allow respondents the opportunity to describe why they chose a program and how dates influenced their choice. In addition, specific questions were built into the instrument that were designed to elicit specific information concerning when participants prefer to enrol, what information sources informed the choice, and how one planned to travel.

### 3.4.4 The Final Instrument

The final instrument contained six sections (Appendix B). The major content areas and types of questions are presented in Table 14.

**Table 14 The Final Instrument**

| Section title | Relates to | Types of questions |
|---|---|---|
| 1. Historical Information | Context, demographics | Fill in the blank, multiple choice, open ended comment-on |
| 2. What type of person are you? | Participant typology | Vignettes with Likert items |
| 3. Decisions | Decision-making factors | Likert items |
| 4. Activity history | Context, demographics | Fill in the blank, multiple choice |
| 5. Travelling with a Companion | Joint decision-making | Multiple choice |
| 6. Summary | Context | Open ended |

## 3.5 Data Analysis

Two forms of data were collected for this study, numeric and written. Content analysis was used to analyze three open-ended questions and summarize the fill-in-the blank questions. The statistical applications selected for the numeric analyses included descriptive statistics, correlation, factor analysis, analysis of variance, regression, and the general linear model. The database was checked for outliers, normalcy, and missing data using a combination of stem-and-leaf plots, frequencies, and descriptive statistics. SYSTAT 6.0 (1996) was the computer software used to perform the quantitative analyses. The default confidence level of 0.05 was retained for all statistical tests. Additionally, the results of the preliminary analysis were shared with 98 Elderhostel site co-ordinators and staff members to obtain their reactions, insights, and help in labelling the factors influencing program choice. Table 15 identifies the analyses selected for each major research question. A brief discussion of each analytical procedure follows.

**Table 15 Type of Analyses**

| RQ # | Major Research Question (RQ) | Major Analyses |
|---|---|---|
| 1. | Do the typologies reported in previous research adequately describe the older adult educational-travel participant? | Factor analysis, correlation, descriptive statistics, frequencies |
| 2. | What are the critical factors influencing older adults in their choice of an educational-travel program? | Factor analysis, means analysis, chi square, descriptive statistics, frequencies, correlation |
| 3. | Which factors influencing program choice are most important to different types of participants? | General Linear Model, multiple regression, step-wise regression, ANOVA |

### 3.5.1 Descriptive Statistics and Chi Square

The use of descriptive statistics is fundamental to all research (Anderson, 1998). Frequencies, means, medians, and standard deviations were used to examine the historical data, the activity history, and the travel companion sections of the questionnaire. Chi square, one of the most commonly used methods of comparing proportions between two or more categorical variables (Fink, 1995), was used to compare specific details of the sample population including: gender, country (Canada or USA), new versus return participants, attending the program alone versus attending with a companion, level of education, and stage of retirement.

### 3.5.2 Exploratory Factor Analysis

Factor analysis is a statistical technique that reduces large sets of variables into smaller hypothetical constructs called factors. Kerlinger (1986) referred to this method as the "queen of analytic methods" (p. 569). Kim and Mueller (1978) highlight that in exploratory research, when the number of underlying dimensions is not known, a factor analysis is an extremely useful statistical procedure. In this study factor analysis was used in the pilot study to reduce the number of items for the final questionnaire, to analyze to analyze the participant typology data (section 2), and to determine the underlying dimensions of the 52 Likert items relating to program choice (section 3) in the actual questionnaire.

The factor analyses were performed using a principal component analysis with varimax rotation and the number of subjects per variable was 15, a number which exceeds the minimum recommendation of five subjects per variable (Kerlinger, 1986; Stevens, 1996). One of the most important decisions in factor analysis is determining the number of factors. Johnson & Wichern (1992) state that most often the final choice "is based on some combination of the proportion of sample variance explained, subject matter knowledge, and the 'reasonableness' of the results" (p. 435). Depending on the source, different authors recommend different guidelines for interpreting and reporting reliable factors. To establish the rules of inclusion for factors in this study, the researcher synthesized recommendations by Stevens (1996), Johnson (1992), Kerlinger (1986) and expert opinion.

Three rules guided the factor selection in this study. First, the eigenvalue, which explains the importance of each factor in a set of variables and the extent to which each variable contributes to the cumulative factor power, was set at 1.0. Second, in order for a variable to be

attributed to a factor, it had to load at ≥ 0.50 on a single factor. The researcher deliberately avoided setting the minimum loading value higher than 0.50 because of the exploratory nature of the research. Selecting a higher loading value (e.g. 0.60) could have prematurely limited the insight into understanding the underlying factors or eliminated factors that are relevant to certain sub-populations within the sample (Heischmidt, 1992). Finally, the researcher concurred with Stevens (1996) who stated that factors with only a few loadings "are as close as we can get to the factor being variable specific" (p. 373). Accordingly, factors with few variables were accepted as reliable for the sample size was greater than 300 (Stevens, 1996).

## 3.5.3 The General Linear Model (GLM)

The General Linear Model (GLM) is a very powerful procedure that uses correlation, regression, and analysis of variance to study the relationships between several variables (Stevens, 1996). The output derived actually represents that of multivariate regression, in that it can be used to predict several dependent variables from a set of independent variables. Using the GLM for this exploratory study was ideal because it first calculated the variance between all variables (the factors influencing program choice, the participant types and four demographic subsets) using a multivariate regression equation, then presented the results for each dependent variable as if they were regressed separately on the set of predictors (Johnson & Wichern, 1992).

### 3.5.3.1 Correlations

Correlations test the magnitude and direction of the relationship between two variables (Kerlinger, 1986) and were used to investigate the relationships between the decision-making factors and select characteristics of various sub-populations. Specifically, a Pearson Product Moment correlation matrix of all the major variables was examined and correlations greater than 0.30 (+/-) were identified and reported. Cases with missing data were omitted from the analysis by selecting SYSTAT's listwise feature.

### 3.5.3.2 Regression Analysis

The purpose of regression is to determine how well one can predict the value of one variable (e.g. life expectancy) by knowing the values of one or more other variables (e.g. personal illness history, family illness history, income, country). In this study the use of regression was used to determine which of the factors influencing program choice could predict each participant

type (e.g. Content-Committed) and the select demographic characteristics (e.g. country). Stevens (1996) recommends a minimum of 15 subjects per predictor variable for a reliable equation, this study had 54 subjects per variable (n= 811/15 factors influencing program choice).

#### 3.5.3.3 Step-Wise Regression Analysis

Step-wise regression analysis instructs the computer to find the best equation possible by entering independent variables in various combinations and orders according to predetermined criteria. Forward elimination, which begins with no variables in the model, was selected for this study because the re lationships between the variables were not known. Using forward elimination, the computer extracts the independent variable that is the strongest predictor and works through the variables until no more variables can pass the tolerance level (the minimum value for entry into the equation). SYSTATs default tolerance level of 0.15 was used. The "to enter" and "to remove" defaults (minimum values where a predictor can be included or removed from the equation) were tightened because the correlations revealed that there was some degree of inter-correlation between some of the predictor variables. The researcher, in consultation with her academic advisor, decided to use a 0.10 to enter/remove level rather than the 0.15 default.

#### 3.5.3.4 Analysis of Variance (ANOVA)

Stevens (1996) states that "any treatment worth its salt will affect the subjects in more than one way; hence the need for several criterion measures" (p. 151). Analysis of variance (ANOVA) and multivariate analysis of variance (MANOVA) are used to determine the statistical significance between the mean scores of two or more groups on a dependent, or set of dependent, variables (Gall et al., 1996). They are useful techniques for reducing and simplifying data, sorting and grouping, investigating variable dependency, predicting, and constructing or testing hypotheses (Johnson & Wichern, 1992). Because more insight is likely to be gained by investigating two (ANOVA) or more (MANOVA) dependent variables at one time (Lue, 1992), analysis of variance is a particularly useful statistical application when investigating the relationships between the decision-making factors and select characteristics of different sub-populations within the sample.

Nine ANOVAs were calculated, within the GLM, providing the opportunity to determine where statistically significant relationships existed between the factors influencing program choice and nine variables: 5 participant types, gender, country, enrolment and escort. Due to the

limitations of SYSTAT (maximum number of eight dependent variables recommended) and the random access memory of the computer (32 MEG), a complete MANOVA with all variables was not possible. Therefore, the ANOVA results were not used independently but rather, to triangulate the regression findings.

### 3.5.4 Content Analysis

Content analysis is a method of systematically classifying textual material to reduce it to more manageable bits of information for analysis (Anderson, 1998; Kerlinger, 1986; Weber, 1990). This questionnaire contained three open-ended questions (1.3, 1.8, and 6.0) that were coded according to the 15 underlying themes identified in the factor analysis. Additional emergent categories were identified as the analyses progressed and when appropriate, adopted as factors. The open-ended questions were analyzed using MS Excell to sort, search, and organize the data. The primary reasons for including open-ended questions in this study were:

1. To determine if the factors influencing educational program choice, written in prose, matched or complemented those emerging from the statistical analysis and those that were queried elsewhere in the questionnaire (e.g. dates, sources of information);
2. To permit the researcher to examine the frequency of certain concepts and gain a deeper understanding of how certain factors influence the educational choice process; and
3. To expand the context for understanding educational choice by permitting the respondent to provide specific information relevant to her or his situation.

## 3.6 Limitations

"There are no prefect research designs" (Patton, 1990, p. 162). Every study is limited by both external and internal factors such as the availability of resources, time, and the human capacities of the individual researcher or members of research teams. When developing a research design, all researchers make decisions that delimit the study. These early decisions, as well as activities that occur during the research process, inevitably create limitations that impact certain elements of the study (e.g. generalizability). Anderson (1998) writes that "there is no harm in having limitations, but it is bad form not to admit them" (p. 88).

### 3.6.1 Generalizability

The findings of this study can only be generalized within Elderhostel Canada according to the noted limitation in section 3.3.4 . The results are representative of participants enrolled during the fall semester. The researcher recommends highly that the study be replicated on a twelve-month basis to test the findings over the various seasons of the year, as well as with programs in the United States of America to expand these findings to the larger Elderhostel community and eventually, other educational-travel programs.

### 3.6.2 Participant Recall

This study required participants to recall the influence of various factors after they had registered for their Elderhostel program. Neuman (1997) questioned the ability of participants to recall and truthfully report information with accuracy. However, despite this reality, it does not mean that asking participants to recall their decisions has no value. On the contrary, Carroll & Johnson (1990) state that self-reporting methods are usually the starting point for exploratory research to help bring understanding to the phenomena and generate hypotheses.

### 3.6.3 The Instrument

At the onset the researcher needed to make a fundamental decision: to create an instrument that sought depth on a specific component (e.g. decision-making factors) or breadth on a variety of elements (e.g. decision-making, typologies, and new contextual information). The latter was selected because this was an exploratory study and the researcher wanted to explore as much as possible, within the confines of a single quantitative instrument, to help identify where future research efforts should be concentrated.

# CHAPTER IV: ANALYSIS & RESULTS

## 4.1 Introduction

This chapter presents the analysis and links the findings to those of previous researchers. A discussion of these findings follows in Chapter V. It is important to note that, where possible, the researcher has included visual charts to complement the presentation of findings, particularly with the descriptive statistics. While this may make the document slightly longer, this decision was based on three reasons. First, "a chart says more than a thousand table cells" (Wallgren, Wallgren, Persson, Jorner, & Haaland, 1996, p. 6). Remaining ever cognisant of the fact that one of the primary goals of research is to explain, knowing that the reading audience for these findings will reach beyond academe, and respecting that some people are uncomfortable with hefty numerical charts, it was deemed important to maximize the use of carefully selected figures to enhance or substitute the numeric presentations. Second, the researcher is a visual learner and enjoys the challenge of selecting an appropriate, highly representative chart, that can parsimoniously present large quantities of data in a succinct visual form. Finally, the computer technology available today provides a marvellous vehicle for producing good quality, professional visual images, with a tremendous amount of detail. By providing compact, synthesized illustrations, the reader can glean a significant amount of information at a glance, then while retaining a mental image of the data, read through the prose and detailed statistical tables to more fully understand the research findings.

The reader should also note that percentages have been rounded to the nearest **tenth** in all calculations except the multivariate analyses where the precision of two decimals was deemed necessary. Consequently, table totals may occasionally tally slightly above (e.g. 100.2%) or slightly below (e.g. 99.9%) 100.0%.

This chapter is organized into seven sections, this introduction being the first. The second section describes the participants including their age, education, activity history, participation history and perceptions of Elderhostel. The third section provides the descriptive statistics related to program choice, when the program was selected, method of transportation, the decision to attend alone or with a companion and, joint decision-making situations. The findings from the participant typology are the focus of section four, followed by a presentation of the

findings related to factors influencing program choice in section five. The sixth section presents the multivariate analysis and the chapter concludes with a succinct response to the research questions.

## 4.2 The Sample Population

A total of 811 Elderhostelers (84.2%) responded to the questionnaire. Consistent with previous Elderhostel studies, the gender balance favoured women (65.7%) and the participants sampled had an above average level of post-secondary education for their generation (Mills, 1993; Odyssey, 1995). The distribution between people sampled in the USA and Canada was split 59.1% and 40.9% respectively, and return participants out numbered new registrants 4:1; findings that are consistent with previous Elderhostel studies.

To better understand if the factors influencing program choice vary by demographic characteristics, four variables were selected for analysis: gender, country, enrolment status (new versus return participant), and the escort variable (planned to attend alone or with a companion) The percent of participants in each category represented in this sample are reported in Table 16.

**Table 16 Select Demographic Characteristics**

| Variable | | % | | % |
|---|---|---|---|---|
| Gender | Female | 65.7 | Male | 34.3 |
| Country | USA | 59.1 | Canada | 40.9 |
| Enrolment | Return Participant | 80.4 | New Participant | 19.6 |
| Escort | Attend Accompanied | 78.9 | Attend Alone | 21.1 |

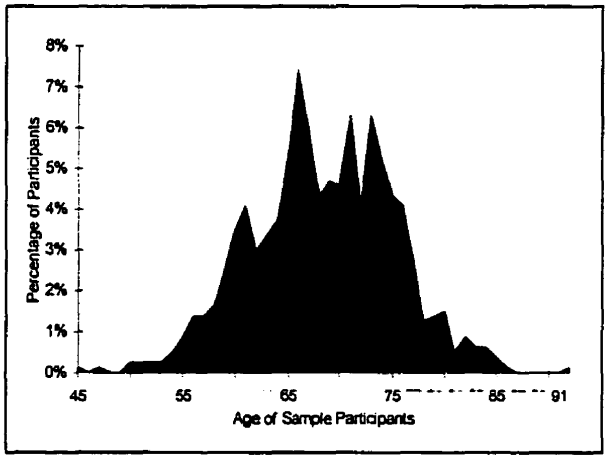
A series of chi-square tests between the demographic variables revealed four statistically significant relationships between country and escort ($df = 1, p < .01$), country and enrolment ($df = 1, p < .01$), gender and escort ($df = 1, p < .01$), and the gender and country ($df = 1, p < .01$) variables. Full details of the tests are presented in Appendix J. An interpretation of the results revealed that:

1. The single largest participant group was American women (36.5%), the smallest, Canadian men (11.6%);

2. The majority of the 21.1% of participants who planned to attend alone were women (78.9%). Furthermore, more Canadian women (24.3%) than American women planned to attend alone (11.3%);
3. The percent of Canadian participants who planed to attend alone (40.6%) more than doubled the percent of Americans (15.7%);
4. The percent of Canadians (29.0%) in the total sample who planned to Attend Accompanied was lower than the Americans (49.9%);
5. Canadians (25.6%) represented the larger percentage of first time participants compared to Americans (15.6%); and
6. The majority of the return participants were American (62.2%).

## Age

**Figure 10 Age Distribution of Fall 1997 Participants**

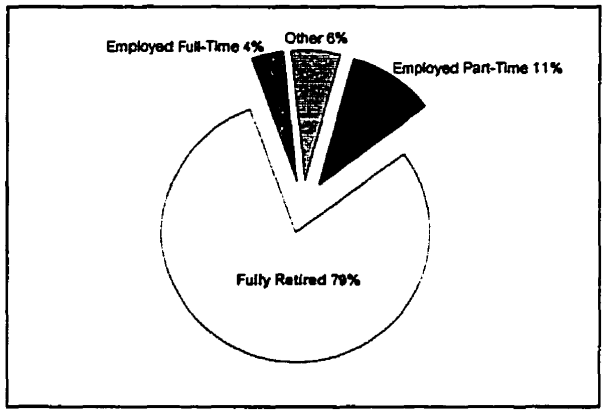



The age of the respondents spanned 47 years. As Figure 10 illustrates, the youngest person sampled was 45 years old (born in 1952), the oldest 92 years (born in 1905). This two-generation spread in participant ages was very similar to the 43 year age range (42 to 85 years) reported by Arsenault (1996).

The average age of the study population was 68 years, slightly below the 1995 average of 71 (Elderhostel Inc., 1994) and a stem-and-leaf plot confirmed that 50% of the participants were between the ages of 64 and 73 years. When examining the age of participants, based on the four demographic variables, one discovers interesting differences with the median and age range statistics (Appendix J). New participants were the youngest (median age = 64 years), whereas the person attending alone and the return participant were the oldest (median age of 70 years). The age range of Americans, women, return participants, and those attending accompanied each spanned 47 years whereas the difference was less for: males (32 years), Canadians (35 years), new participants (32 years), and people attending alone (32 years).

## Stage of Retirement

**Figure 11 Employment Status**




The majority of respondents (79%) were fully retired. Of those who continued to work, 11% were employed part-time, 4% full-time. As Figure 11 illustrates, 6% of the respondents selected the 'other' category and while most did not specify their activity, 24% did state that they do volunteer work, 8% identified themselves as artists, 8% as a housewife, and 8% reported 'doing occasional work'. One hosteler even wrote, "I am a nun and nuns never retire, they just become eligible for Elderhostel!"

## Years of Post-Secondary Education

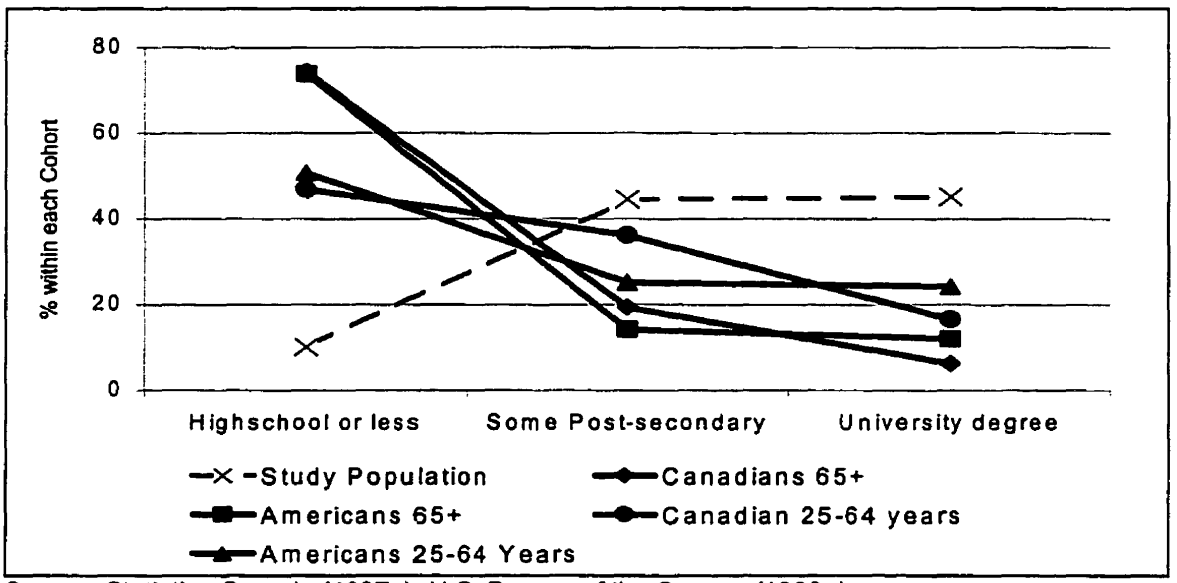
When compared to the North American population, Elderhostelers are consistently reported to have a higher than average level of post-secondary education (Mills, 1993). The participants in this study were no exception. As Figure 12 illustrates, the participants in this educational-travel program had a higher overall level of education than adults aged 25 to 64 years and 65+ years.

Rather than ask participants to list their degrees and diplomas, the older adult learners and academic experts who helped develop the questionnaire suggested asking only for the number of years of formal schooling past high school because it was less intrusive. Additionally, because it was the commitment to learning that was of greater interest, requesting degrees and programs may not fully capture the range of learning activities. In fact Clough (1992a), in her article *Broadening Perspectives on Learning Activities in Later Life,* reports that too often studies of the adult learner focus on people enrolled in courses at a formal educational institution, a focus which is too narrow and does not fully capture the range of activities enjoyed in later life.

To simplify the analysis and permit some parallels to be drawn with other educational statistics, the number of years in post-secondary education was aggregated into five categories:

no post-secondary schooling, 1 to 2 years (college studies), 3 to 4 years (bachelors level studies), 5 to 6 years (masters studies), 7+ (doctoral studies).

**Figure 12 Educational Attainment Comparison**




Source: Statistics Canada (1997a); U.S. Bureau of the Census (1996a)

Table 17 presents the frequencies, mean, standard deviation and median scores for the total population and the four demographic variables. Note that 90% of the study population had enrolled in at least one year of post-secondary education, which is well above the general level of education for people aged 55 years and older (Manheimer et al., 1995; Statistics Canada, 1997a) and higher than the 1984 Elderhostel reported by Mills (1993) which indicated that 80% had attended college: 14% had a four year degree, 18% some post-graduate 20% a masters degree, 3.5% a doctorate, and 8.5% a professional degree. Additionally, the mean number of years of study was 4.3 suggesting that the **average** participant possessed a bachelor's degree or professional equivalent. Finally, 33.4% of Canadians 53.1% of Americans reported 5+ years of post-secondary schooling. When one considers that in 1995, only 6% of Canadians and 12% of American over the age of 65 years had university degrees, the difference between the general population and Elderhostel becomes quite apparent (Statistics Canada, 1997a).

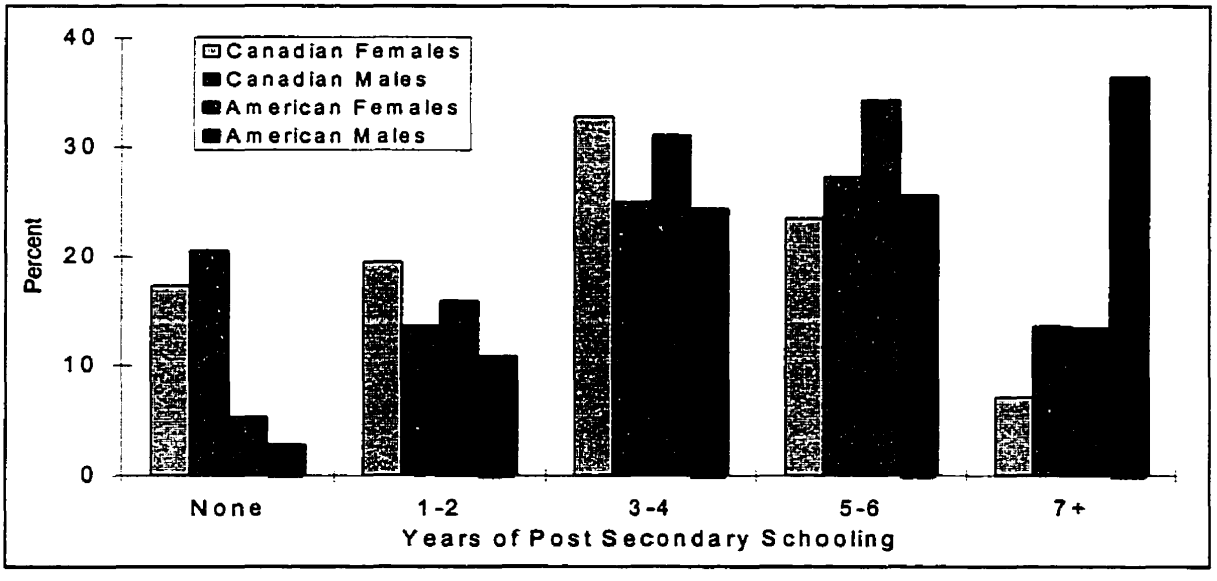
Chi-squares were used to examine the differences within each sub-population. No statistical differences were found between new versus return participants or those attending alone versus accompanied; however, there were significant differences found between nation ($p < .01$, df = 4) and gender ($p = 0.00$, df = 4). Figure 13 diagrams these differences. What is interesting to note is that very few American participants reported no formal schooling (5.3% females, 2.8%

males) compared to 17.3% of Canadian women and 20.5% of Canadian men. During the college and baccalaureate years, the participation rates are similar, but in graduate learning, American females dominate at the masters level, American men at the doctoral level.

**Table 17 Years of Formal Schooling Beyond High School**

| | n= | None | 1-2 Years | 3-4 Years | 5-6 Years | 7+ Years | $\bar{x}$ | SD | Median |
|---|---|---|---|---|---|---|---|---|---|
| Total Population | 773 | 10.0 | 15.5 | 29.0 | 28.3 | 16.8 | 4.3 | 2.6 | 4.0 |
| Male | 264 | 8.7 | 11.7 | 25.4 | 25.4 | 28.8 | 5.0 | 2.9 | 5.0 |
| Female | 509 | 10.6 | 17.5 | 31.8 | 29.5 | 10.7 | 3.9 | 2.4 | 4.0 |
| Canadian | 314 | 18.2 | 17.8 | 30.6 | 24.5 | 8.9 | 3.5 | 2.7 | 4.0 |
| American | 459 | 4.4 | 13.9 | 28.5 | 30.9 | 22.2 | 4.8 | 2.4 | 5.0 |
| Travel Alone | 161 | 12.4 | 11.8 | 29.2 | 28.6 | 18.0 | 4.5 | 3.0 | 4.0 |
| Accompanied | 610 | 9.3 | 16.2 | 29.5 | 28.4 | 16.5 | 4.3 | 2.5 | 4.0 |
| New Participant | 150 | 11.3 | 16.0 | 26.7 | 30.7 | 15.4 | 4.1 | 2.6 | 4.0 |
| Return Participant | 619 | 9.5 | 15.2 | 30.2 | 27.8 | 7.3 | 4.4 | 2.6 | 4.0 |

**Figure 13 Educational Differences Between Canadian and American Elderhostelers**




Note: The percentages reported in this table were calculated based on the number of participants in each category (e.g. Canadian females, with no post-secondary education [39] divided by the total number of Canadian women: 226).

## Activity History

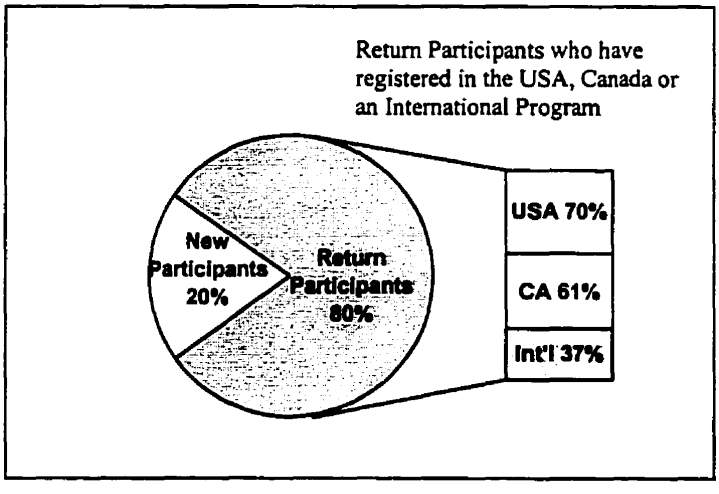
Respondents were asked to indicate which of 10 different activities they had done within the past year and the past three years. An 11th blank option permitted participants to describe activities not mentioned on the instrument. Table 18 summarizes the findings from the past 12 months and three years.

**Table 18 Activity History**

| Activity | % Last Year | % in Last 3 Years |
|---|---|---|
| Taking over-night trips | 79.3 | 63.3 |
| Taking automobile day trips | 77.0 | 62.0 |
| Volunteer work | 58.2 | 50.7 |
| An organized leisure activity (e.g. bridge/garden club) | 49.9 | 40.2 |
| Participating in music, drama, or art activities | 38.2 | 30.6 |
| Playing golf, tennis or another sport | 35.9 | 30.1 |
| Vacationing on a guided tour | 33.9 | 41.4 |
| Religious study | 24.1 | 20.4 |
| Classes at a university of college | 19.4 | 29.2 |
| An Institute for Learning in Retirement program | 14.1 | 15.8 |

## Participation Frequency

**Figure 14 New versus Return Registrant**




Elderhostel offers programs in Canada (CA), the United States (USA) and abroad (Int'l). The majority of the participants surveyed (80.4%) had enrolled in at least one program in these various program categories (Figure 14) Only 19.6% of those surveyed were first time registrants. Of the 647 people who were returning to Elderhostel, 36.9% had previously enrolled in at least one International program, 61.2% Elderhostel Canada program, and 69.7% in programs offered in the USA.

A review of the descriptive statistics revealed that two of the most enthusiastic Canadian Elderhostelers were John and Janice, an 81 and 66 year old husband and wife team. Janice had attended 70 programs: 45 in Canada, 20 in the USA and 5 abroad and her husband John participated in 40 Canadian, 20 USA and 5 International programs. Stanley, the most enthusiastic American hosteler boasted 58 program registrations: 4 in Canada, 47 in the USA and 7 abroad. At age 76, Stanley planned to travel by car and attend the Fall 1997 program with his wife. The most international hosteler surveyed was only 67 years old, an American, who planned to attend the program in Canada alone. Linda reported that she had attended 33 international programs!

Due to the number of statistical outliers and the large standard deviations (3.4 to 7.6), a stem-and-leaf plot proved to be the most useful way to examine the data on previous enrolment (Table 19.) The lower and upper hinges, which represent the 25th and 75th percentiles respectively, revealed that 50% of the people had previously enrolled in 1 to 3 Canadian programs, 1 to 6 American programs and 1 or 2 internationally. The median scores for attendance were 2, 4, and 1 respectively.

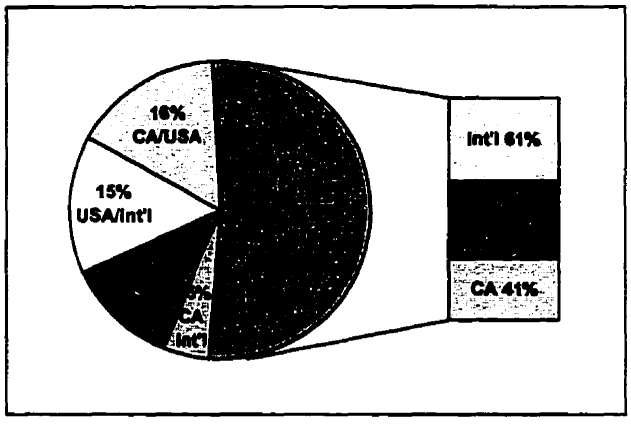
**Table 19 Stem-and-Leaf Plot and Select Descriptive Statistics on Previous Enrolment**

| Attended Programs in: | N = | Sd[a] | Range[b] | Stem-and-Leaf Plot | | |
|---|---|---|---|---|---|---|
| | | | | Lower Hinge | Median | Upper Hinge |
| Canada | 312 | 5.7 | 0 to 45 | 1 | 2 | 3 |
| The United States | 328 | 7.6 | 0 to 49 | 1 | 4 | 6 |
| International | 155 | 3.4 | 0 to 8 | 1 | 1 | 2 |

[a] Standard deviation
[b] Range, with the exception of 3 outliers, 14, 18 and 33.

Although many hostelers reported enrolling several times with Elderhostel, the majority of return participants in this study (52%) indicated only one previous registration: 41% of these were in Canada, 53% in the USA, and 6% abroad (Figure 15). For participants with two or more prior program registrations, the Canada / USA

**Figure 15 Previous Attendance with Elderhostel**

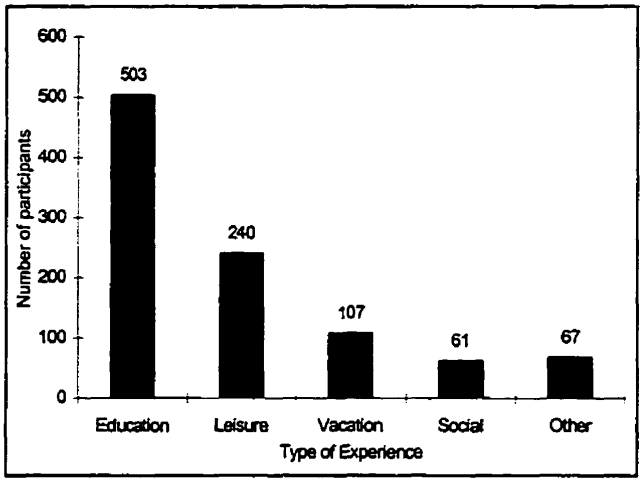


combination was the most popular (16%) followed by USA / International (15%), the Canada / International / USA (12%) and finally, Canada / International (5%).

### Perceptions of the Nature of the Elderhostel Experience

Participants were asked to identify whether they thought of Elderhostel primarily as an educational experience, vacation, recreation/leisure activity, or an opportunity to socialize. A fifth, 'other' fill-in-the-blank option enabled participants to define, for themselves, how they perceive Elderhostel programs. The researcher intentionally asked a forced choice question in an effort to determine which category type dominated in the minds of the participants. In retrospect however, an open-ended or rank-order question may have been more appropriate for, despite instructing participants to 'check only one' option, many took the liberty of checking more than one category. A number of respondents were so displeased with being asked to select only one category, they wrote comments in the margin such as, "It is not possible to separate these", "This is not a fair type of question," or "To check only one is difficult for me, it is a combination of all four points." Therefore, Figure 16 reports the total number of participants who checked each respective category, rather than percentages. These values should be used with caution.

**Figure 16 Perception of the Nature of the Elderhostel Experience**




The fact that several participants ignored the instructions and checked multiple categories resonates, as a strong message, that Elderhostel is not just an educational program for older adults. Although Elderhostel's mission statement (Elderhostel Inc., 1998a) states they offer high quality educational opportunities; many hostelers report that they perceive Elderhostel as a leisure experience or vacation. Perhaps if one were to do a benefit analysis, the links between the education, leisure and travel could be better understood. For now, it is safe to say that Elderhostel programs offer a range of benefits including: an educational-adventure, a time for personal growth, a vacation, or simply a time to enjoy learning. A synthesized list of the qualitative comments reported in question 1.7 is located in Appendix J.

## 4.3 Elderhostel Canada Fall 1997 Program Choices

The respondents in this survey were enrolled in 74 different program weeks located in six Canadian provinces. In terms of the actual number of participants, 179 attended programs in Alberta, 176 in Ontario, and 174 in British Columbia. However, by examining the data on a ratio basis an interesting detail emerges (Table 20). The ratio of participants to the number of programs offered in Manitoba far exceeds any other province, and all three-program weeks were in the same location – Churchill with a 1:39 program to participant ratio. What was the attraction? The following quotations help explain.

> **Ryan:** I always wanted to visit a place that was totally new to me and I wanted to see the northern lights.
>
> **Jocelyn:** I'm fascinated by Canada's north, polar bears, and I wanted to experience my first Elderhostel there.
>
> **Rita:** We wanted to be in Churchill for the annual polar bear migration. We looked at both commercial tours and the Elderhostel offering and the latter interested us because of the educational features of Elderhostel.
>
> **Erma:** The Churchill trip offered more than any tour at half the cost. The educational component is a bonus.

**Table 20 Provincial Enrolment Distributions**

| | Elderhostel Canada Statistics | | Sample Statistics | | | |
|---|---|---|---|---|---|---|
| Province | # Program Weeks Offered | Registered Fall 97 | # Program Weeks in Sample | Returned Questionnaire | % of Sample | Ratio |
| British Columbia | 20 | 221 | 18 | 174 | 21.5 | 1: 10 |
| Alberta | 21 | 257 | 16 | 179 | 22.1 | 1:11 |
| Manitoba | 5 | 140 | 3 | 116 | 14.3 | 1:39 |
| Ontario | 31 | 335 | 18 | 176 | 21.7 | 1: 10 |
| New Brunswick | 9 | 54 | 8 | 51 | 6.3 | 1: 6 |
| Nova Scotia | 12 | 162 | 11 | 115 | 14.2 | 1:11 |
| TOTALS | 99 | 1169 | 74 | 811 | 100.00 | n/a |

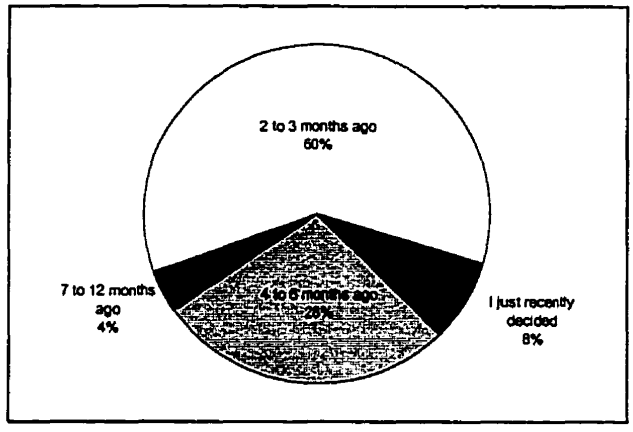
Source: Elderhostel Canada, 1998

Note: Specific site, location, and program dates are located in Appendix K.

## When the Program was Selected

Participants were asked to identify when they made their decision to enrol in the Fall 1997 Elderhostel Canada program. As Figure 17 illustrates, the majority reported making their decision two to three months prior, only 0.25% indicated that they could not remember when the decision was made.

**Figure 17 When the Program was Selected**

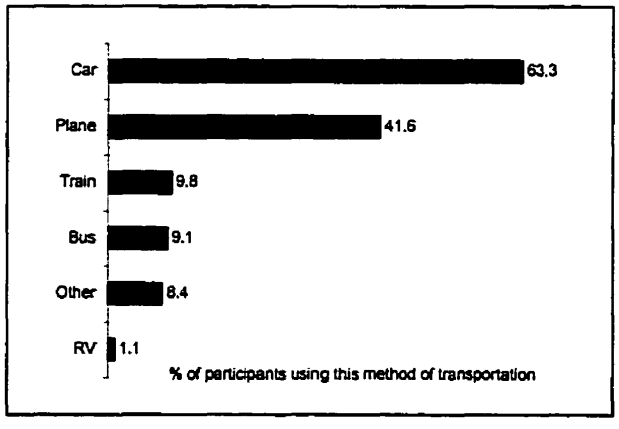



Because the survey reached the participants approximately two months after the registration period began, it appears that program choices were finalized near the start of the fall registration period. The second most common time frame was 4 to 6 months previously (26.6%), after the Elderhostel catalogue(s) had arrived but prior to registrations being accepted.

## Method of Transportation

Participants were invited to check all methods of transportation they planned to use to travel to their Fall 1997 program. Consistent with the pleasure travel literature; travelling by car was the most popular method, cited by 63.3% participants (Figure 18). Morrison (1994) explains that the reason elders prefer car travel is because they want to avoid carrying heavy or bulky luggage and the stress of being in an airport.

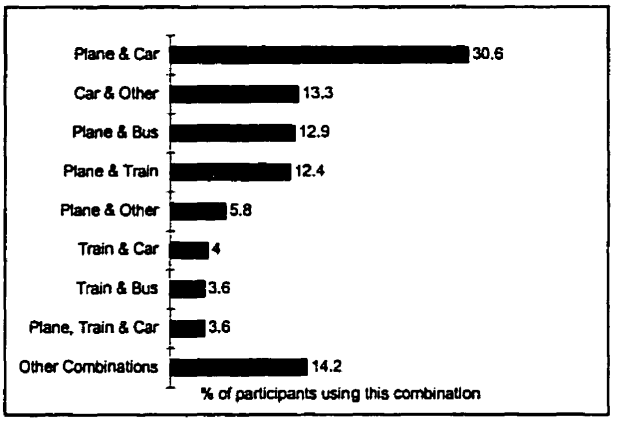
**Figure 18 Method of Transportation**




A full 41.6% anticipated taking an airplane, 9.8% the train, and 9.1% a bus. Only nine respondents indicated they would travel using a recreational vehicle. For the 8.4% who indicated another form of travel, 75% said they would travel by ferry. The remaining 25% in the 'other' category either didn't know (5%), planned to take a taxi (5%), or indicated a combination of travel options such as ferry, taxi and bus (Appendix K).

A frequency check on the number of people who indicated multiple travel methods found that 27.9% planned to use a combination of two or more modes of transportation. Figure 19 illustrates the most common combinations identified and Appendix K provides the full statistical details. The most popular form of combined transportation was the plane and car. The second most popular was by car and 'other', the other combinations represented, in most cases, those who needed to travel by ferry to reach their destination on Vancouver Island in British Columbia.

**Figure 19 Multiple Methods of Travel**

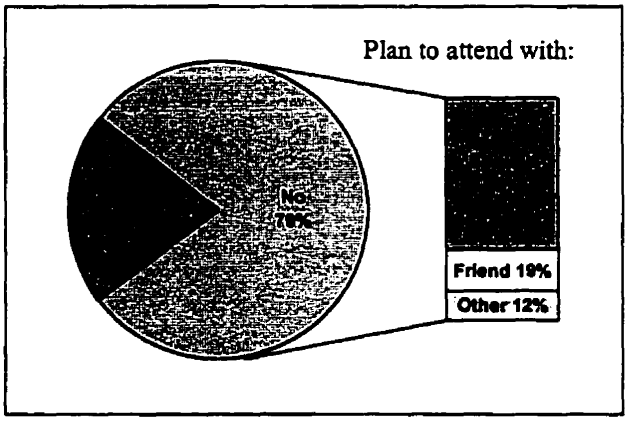



## Attending with a Companion

This section of the inquiry was included to determine the number of people who planned to attend their Elderhostel program with a companion. It also gathered rudimentary information concerning who, in joint decision-making situations, made certain choices; an important element to understand when examining program choice. In the preceding MA study, Arsenault (1996) discovered that participants who planned to attend alone described the program selection process very differently that those people who planned to attend with a companion. The later involved a variety of negotiation strategies between two or more people.

When asked, "Do you plan to attend this Elderhostel alone?" 21% responded yes and 79% stated no. Of those who planned to Attend Accompanied, 69% said they would attend with their spouse, 19% with a friend and 12% checked 'other' (Figure 20). The 'other' person cited most often was a sister (see Appendix K). When queried about the gender of their travel companion, 36% indicated they would

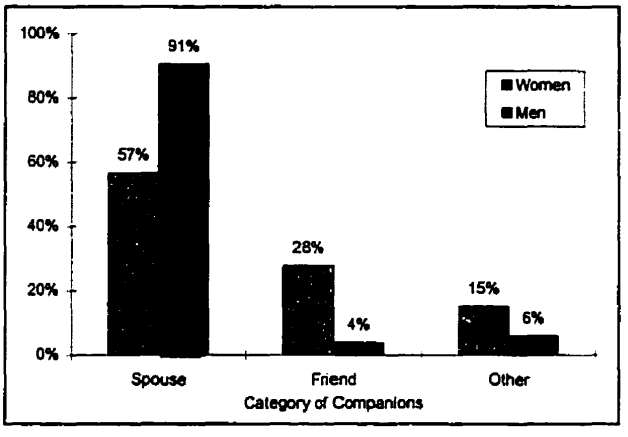
**Figure 20 Do you Plan to Attend Alone?**



attend with a male, 54% with a female, and 10% planned to attend with more than one companion (the gender mix in this category was not queried).

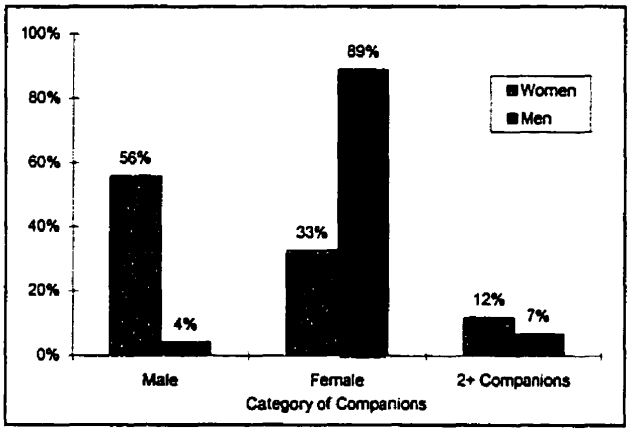
A chi-square between gender and type of companion ($p < .01$, df = 2.0) revealed that almost all men planned to attend with their spouse (91%). This was not the case for women. As Figure 21 illustrates, only 57% of the females planned to attend with their spouse, 28% with a friend, and the remaining 15% with another person (s).

**Figure 21 Type of Elderhostel Companion**




A second chi-square between the gender of the participant the gender of their Elderhostel companion revealed some striking differences between men and women ($p < .01$, df = 2.0). Figure 22 shows very distinctly that the majority of men (89%) planned to attend with a woman, only 7% planned to attend with more than one person, and very few men (4%) would be accompanied by another man. Here again, the gender distribution for women was quite different; 56% planned to attend with a man, 32% planned to attend with another female, and 11% forecasted attending with more than one person.

**Figure 22 Gender of Elderhostel Companion**




## Joint Decisions

Anticipating that the majority of Elderhostelers would plan to attend with at least one other person, the researcher wanted to establish a preliminary base of information concerning who made certain program choice decisions. Table 21 illustrates, 83% to 94% of the hostelers make the majority of decisions together, in particular those relating to dates (90.8%), accommodations (91.2%), and final program choice (93.9%). This is a particularly valuable piece of information for future investigators who wish to examine the choice of an educational-travel

program for the influence of family and friends on consumer choice is well documented (Kindra et al., 1994; Walters & Bergiel, 1989).

The results reported here illustrate a very high percentage of joint decision-making between people who travelled with their spouse. These results are different than those reported by Myers & Moncrief (1978). By segmenting by age, these researchers found that 74.8% of the destination decisions were made jointly by people aged 60 years and over, 69.2% for those aged 50 to 59 years. The accommodation decision was lower in Myers & Moncrief study where only 68.2% of people aged 60+ and 70.7% of those aged 50 to 59 years, made this decision jointly compared 90.8% with this Elderhostel sample. The fact that the Myers & Moncrief study was published in 1978, and this study occurred two decades later, the increase in the percent of joint decisions may be higher due to the changing roles of women in society. In particular, an increase in women in the workforce and the blurring of sex roles (Nichols & Snepenger, 1988).

**Table 21 Choosing a Program with a Companion**

| Decision Items | | % Responding | | |
|---|---|---|---|---|
| | n = | I Decided | Partner Decided | Joint Decision |
| The decision to enrol with Elderhostel | 633 | 11.1 | 5.9 | 83.1 |
| The choice of geographical location | 626 | 8.3 | 6.4 | 84.8 |
| The type of program (e.g. history) | 621 | 8.1 | 4.8 | 87.1 |
| The method of travel (e.g. car, train) | 621 | 6.8 | 5.3 | 87.9 |
| The distance you would travel to reach the site | 590 | 6.3 | 4.2 | 89.5 |
| The type of accommodations | 608 | 5.3 | 4.0 | 90.8 |
| The dates you were able to attend | 624 | 5.3 | 3.5 | 91.2 |
| The final program choice | 625 | 4.3 | 1.8 | 93.9 |

## 4.4 The Participant Typology

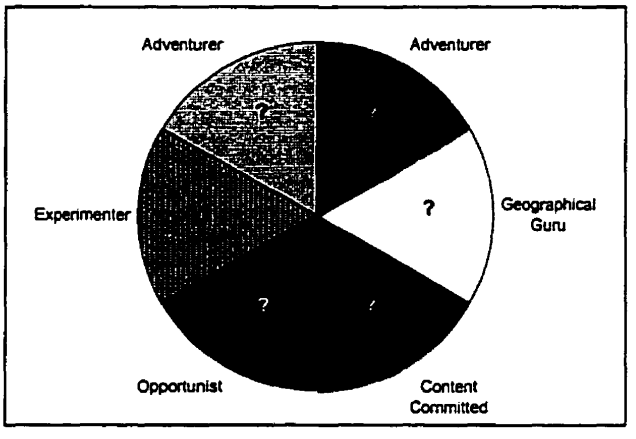
Chapter two reported on the usefulness of typologies and how, by grouping people together with shared characteristics, one can gain a better understanding of the adult education or pleasure-travel participant. The first research question in this study asked: **Do the typologies reported in previous research adequately describe the older adult educational-travel**

**participant?** Section two of the questionnaire focused on determining if these participant types were pure (e.g. Adventurer), blended (e.g. Experimenter and Opportunist). A second objective was to determine which participant type(s) were dominant.

To begin, Table 22 presents the original descriptions of the six participant types described by Arsenault (1996). These definitions formed the basis of this section of the inquiry.

This typology was presented at the 1997 Global Classroom Conference (Arsenault et al., 1997) as well as at several Elderhostel Canada training seminars. It received positive feedback and sparked the curiosity of practitioners who offer and administer educational-travel programs.

**Figure 23 The Unknown Distribution of the Participant Typology**




At the time of these presentations, all that was known was that six types existed (Figure 23). What was unknown was whether or not these categories rep-resented pure types or if the number of types could be reduced. Additionally, the number of people in each component of the typology was unknown.

To obtain data, respondents were asked to read 6 vignettes describing each of the participant types. Then, on a 5-point Likert scale, respondents were asked to circle the number indicating the degree to which they were similar to the type of person described in the vignette (Figure 24). The response rate to these six questions was high, 99%.

**Figure 24 Sample Vignette Question**

You love exploring and look for a program that takes you to a part of the world you have never seen to learn about the local area, history, people, or customs.

← 1 2 3 4 5 →

That's not me at all That sounds like me

**Table 22 The Original Elderhostel Participant Typology**

| Label | Description |
|---|---|
| The Activity Oriented | The Activity-Oriented will only register in programs that include some form of physical activity. The Activity-Oriented person wants to be outdoors, explore the natural environment, and be actively engaged in their learning. This could be golf, hiking, canoeing or walking through nature to bird watch. This type of person enjoys the outdoors, wants to learn in the natural environment, and is not attracted to programs where the entire Elderhostel learning component is perceived to be in a classroom. |
| The Geographical Guru | Selects a region, area or city they would like to explore. The type of Elderhostel program is not a priority consideration. What draws this person to a given site is the opportunity to see, explore and learn about a new area. The primary interest is to learn about the area and when possible, geographical gurus will extend their visit to continue exploring. |
| The Experimenter | The experimenter is the novice participant who is investigating Elderhostel by trying a variety of programs to see where their interest lies. Their first experience is close to home (one tank of gas) and they select their program based on: (1) enrol in a course with a physical activity option because they are afraid of entering a setting which is too 'academic' or (2) they enrol in an 'academic' course in which they possess some pre-requisite knowledge. |
| The Adventurer | Willing to go anywhere and try anything. They are looking for new experiences in learning and socializing and will even sacrifice accommodation preferences just to have a new experience. |
| The Content Committed | Subject is everything. Willing to travel anywhere to find a site with a program that supports their learning interests in a particular subject area. Good instruction at a university level is critical and this person is willing to wait until their subject comes up rather than attend a site outside their subject area. Location is not as important. |
| The Opportunist | This person sticks out like a sore thumb and can be ostracized by the regular hostelers. He or she enrols not for reasons related to the Elderhostel program, rather for some personal reason like taking advantage of inexpensive meals and accommodations while visiting an area. |

Source: Arsenault, 1996, p. 133.

An analysis of the mean scores revealed that respondents identified most closely with the Geographical Guru ($\bar{x} = 4.1$) and the Activity-Oriented ($\bar{x} = 3.7$) descriptions and few identified with the Experimenter and Opportunist (Table 23). A review of the Pearson correlation matrix presented in Table 24 reveals the strongest association were between the Geographical Guru and the Adventurer ($r = 0.50$), the second strongest between the Experimenter and the Opportunist ($r = 0.33$).

**Table 23 Descriptive Statistics on the Vignette Responses**

| Vignette | n[a] = | Mean Score | Percent Responding to the Description[b] 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|---|
| Geographical Guru | 800 | 4.1 | 2.4 | 4.6 | 18.4 | 31.3 | 43.4 |
| Activity-Oriented | 802 | 3.7 | 6.4 | 9.9 | 22.4 | 29.3 | 32.0 |
| Adventurer | 799 | 3.3 | 10.3 | 18.1 | 23.5 | 28.9 | 19.1 |
| Content-Committed | 803 | 2.6 | 27.1 | 20.3 | 29.1 | 15.8 | 7.6 |
| Experimenter | 801 | 1.7 | 60.0 | 22.0 | 11.2 | 5.1 | 1.6 |
| Opportunist | 801 | 1.7 | 55.8 | 24.8 | 12.96 | 5.1 | 1.4 |

[a] Maximum = 811

[b] See scale previous page

**Table 24 Pearson Correlation Matrix on the 6-Part Typology**

| | Geographical Guru | Adventurer | Experimenter | Opportunist | Content-Committed | Activity-Oriented |
|---|---|---|---|---|---|---|
| Geographical Guru | 1.00 | -- | -- | -- | -- | -- |
| Adventurer | 0.50 | 1.00 | -- | -- | -- | -- |
| Experimenter | -0.28 | -0.20 | 1.00 | -- | -- | -- |
| Opportunist | -0.08 | -0.07 | 0.33 | 1.00 | -- | -- |
| Content-Committed | -0.03 | 0.08 | 0.05 | -0.06 | 1.00 | -- |
| Activity-Oriented | 0.16 | 0.21 | 0.01 | 0.07 | 0.00 | 1.00 |

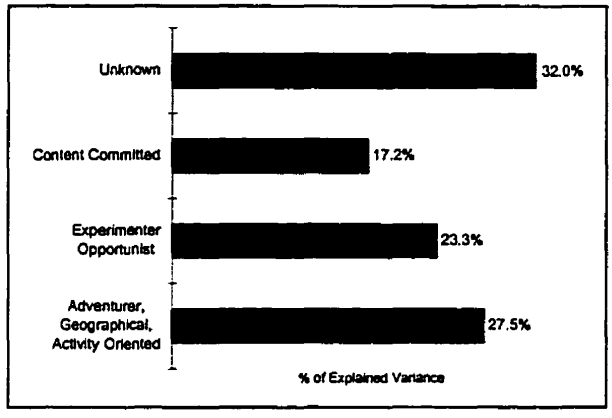
Note: Number of observations = 777

### 4.4.1 Typology Factor Analysis

Principal component analysis with a varimax rotation was used to run a number of factor analyses on the 777 person database to identify any underlying dimensions in the typology (34 cases were deleted due to missing data). To begin 3, 4, and 5-factor solutions were explored with the entire population, then a second series of 3, 4, and 5 factor-analyses series were run with each demographic variable to determine if a general typology could be reported or, if there were any unique underlying constructs particular to specific subsets of the sample population.

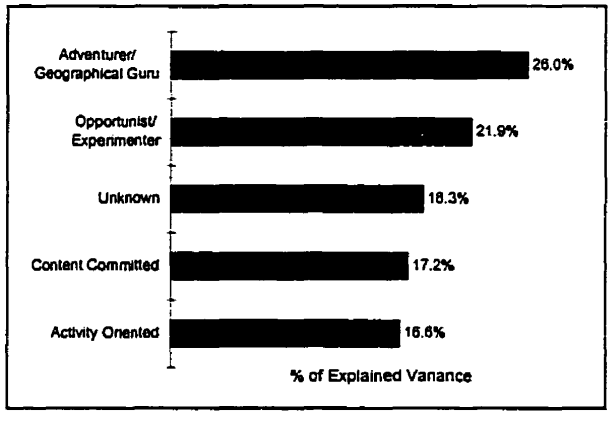
## The Initial Factor Analyses

**Figure 25 Three-Factor Typology Solution**




The first factor analysis of the total population revealed three underlying constructs that accounted for 68% of the explained variance (Figure 25). Consistent with the 0.50 correlation identified in Table 24, the Adventurer and Geographical Guru loaded strongly on Factor 1 at 0.80 and 0.77 respectively, along with the Activity-Oriented at 0.59 (for full details see Appendix L). Again, consistent with the findings from the correlation matrix the Experimenter and Opportunist ($r = 0.33$) loaded together to create the second factor. Because the definition for these two participant types were so different, this finding seemed incongruent and it prompted the researcher to push the factor analysis to 4-factors to see if these elements would load on separate factors. They did not!

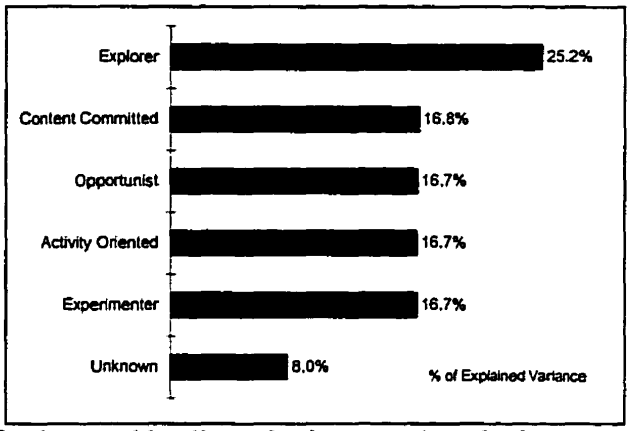
**Figure 26 Four-Factor Typology Solution**




The percent of unexplained variance dropped considerably in the 4-factor analysis from 31.96% to 18.26% (Figure 26). By pushing the analysis to a 4-factor solution, the Activity-Oriented emerged with an eigenvalue of 0.99. The Geographical Guru and Adventurer remained clustered together, as did the Experimenter and Opportunist. The Content-Committed remained alone. Because pushing the factor analysis did not satiate the researchers curiosity concerning the relationship between the Experimenter and the Opportunist, each case with a score of 4 or 5 for the Experimenter and Opportunist vignettes was pulled from the data base and examined individually to determine if the self-declared Opportunist was also a self-declared Experimenter. In all but one of the 106 cases, they were not the same people. This discovery prompted the researcher to try a five-factor solution, despite the fact the eigenvalues for the fourth and fifth factors were less than 1.0.

In the five factor solution, the Adventurer and Geographical-Guru remained together, the Content-Committed alone, the Activity-Oriented alone, and the Experimenter and Opportunist located on separated factors. The five-factor solution accounted for 92.0% of the explained variance (Figure 27).

**Figure 27 Typology 5 Factor Solution**




Knowing that pushing the factor analysis to a five factor solution breached a fundamental loading criterion – retain only those factors with an Eigenvalue of 1.0 or greater – (Johnson & Wichern, 1992; Kerlinger, 1986; Stevens, 1996), the researcher opted to factor analyze the subsets (gender, country, enrolment, escort) in the population prior to drawing final conclusions.

A series of 3, 4, and 5-factor analyses were run for women, men, Canadians, Americans, new participants, return participants, people attending alone and people who planned to attend accompanied (full details in Appendix L). A review the results of these multiple factor analyses reinforced the fact that a 5-type solution should be retained. With the exception of the new participant, the 5-factor solution for the sub-populations, based on demographic characteristics, remained the same as for the total population. Table 25 provides a synthesis of these findings.

**Table 25 A Synthesis of the Findings from the Factor Analysis by Demographic Variable**

| | |
|---|---|
| Explorer | The Geographical Guru and Adventurer consistently loaded on the same factor regardless of demographic characteristic. This led to the decision to merge these two types and rename the type of participant the Explorer. |
| Activity-Oriented | This type remained separated from the Explorer in all 4 and 5-factor solutions regardless for all demographic variables. |
| Content-Committed | The Content-Committed remained pure throughout the entire analysis except on one occasion. In the 3-factor solution, for first-time participants, the Content-Committed (-0.83) loaded in opposition to the Experimenter (0.73). |
| Experimenter | The Experimenter loaded together with the Opportunist in all 3 and 4 factor solutions except for first time participants. For this group, in both the 3 and 4-factor solutions, the Experimenter loaded in opposition to the Explorer. |
| Opportunist | The Opportunist loaded together with the Experimenter in all 3 and 4 factor solutions except for the first-time participant. For new participants, the opportunist loaded in opposition to the Content-Committed in the 3-factor solution and alone in the 4-factor solution. |

## Recommendation on the Number of Participant Types

These findings from the typology factor analyses enable the researcher to answer the question: **Do the types of participants described in previous research adequately describe the older adult educational-travel participant?** The answer is yes, based on the findings reported by Arsenault (1996), however rather than continue with the six types of participants she recommended, the findings from this study indicate a 5-factor solution would be more appropriate. The Content-Committed, Activity-Oriented, Experimenter, and Opportunist remain intact, the Geographical Guru and the Adventurer however have been united to create the Explorer. This recommendation is based on the triangulation of evidence from the descriptive statistics, correlation, and the series of factor analyses. The following summary comment are offered concerning which factors were 'pure' and which factors were 'blended':

1. One pure participant typology exists, the Content-Committed. It represents the only category that stood alone consistently accounting for approximately 17% of the explained variance in the 3, 4, and 5-factor solutions, regardless of demographic variable;

2. One blended participant typology exists consisting of the Adventurer and the Geographical Guru. The new participant type is called '**The Explorer**' and the new variable was used in all subsequent calculations;

3. Based on the amount of explained variance in the factor analyses, one dominant participant type exists, the Explorer, accounting for 28% of explained variance in the 3-factor solution, 26% in the 4-factor solution, and 25% in the 5-factor solution;

4. The researcher recommends the Experimenter and Opportunist remain as separate participant types at this stage. When considered in context with the qualitative findings of the MA study, and in consideration of the feedback received from other non-Elderhostel educational-travel programmers and researchers (who enthusiastically endorsed the two types of participants), the researcher believes it would be premature to synthesize these factors at this time; especially when one considers that the number of participants represented in categories in this survey was extremely low, 6.7% for the Experimenter and 6.5% for the Opportunist. One would hope that with a larger sample size in a quantitative study, or in-depth interviews in a qualitative

study, more clarity and understanding could be gleaned on these two types of participants; and

5. The 5-type participant typology can describe all people in the sample, with perhaps one exception – the new participant. The fact that this analysis raises questions about the new participant signals to the researcher the importance of examining first time participants independently to understand what influence their decision to enrol and choose a program for the first time.

## 4.4.2 Categorizing Participants

Once the typology groups were established the next task was to determine how many participants represented pure types (e.g. an Explorer) or a blended type (e.g. an Explorer and Content-Committed). Each file was reviewed individually, and based on a predetermined set of rules, participants were assigned a number between one and seventeen representing their category in the 5 x 5 matrix presented in Table 26. Appendix M describes the rules for inclusion and the numeric-coding scheme.

**Table 26 Pure and Blended Participant Types**

| Participant Type | Explorer | Activity-Oriented | Content-Committed | Convenience-Oriented | Opportunist |
|---|---|---|---|---|---|
| Explorer | 21% | -- | -- | -- | -- |
| Activity-Oriented | 11% | 32% | -- | -- | -- |
| Content-Committed | 2% | 4% | 7% | -- | -- |
| Convenience-Oriented | -- | 1% | 1% | 2% | -- |
| Opportunist | 1% | 1% | 1% | -- | 1% |

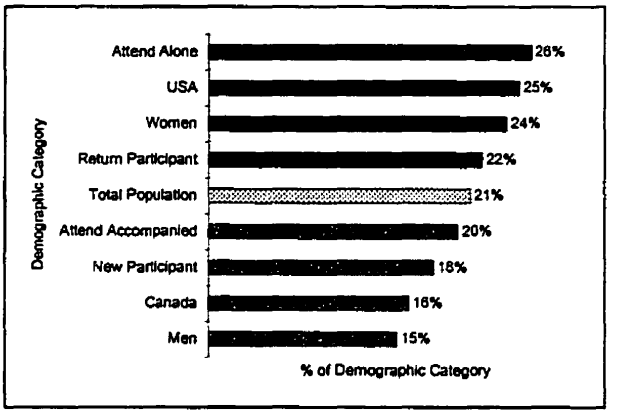
Note 1: 15% were not placed in the typology: 2% indicated 3 or more equal scores of 4s or 5s and 13% rated all categories <4.0

The dominant participant type in this sample was the Activity-Oriented, accounting for 32% of all participants, followed by the Explorer at 21%. Few people categorized themselves as purely Content-Committed, Convenience-Oriented, or Opportunists. Of the blended categories, the Explorer/Activity-Oriented accounted for 11%, the Activity-Oriented/Content-Committed accounted for 4% of the participants, and the others were negligible. Fully 64% of the sample could be described using the pure Explorer, pure Activity-Oriented and the blended Explorer/

Activity-Oriented combinations. This percentage increases to 77% when the Content-Committed is included. Thirteen percent of the population did not identify with the vignette descriptions, while two percent identified with three or more types.

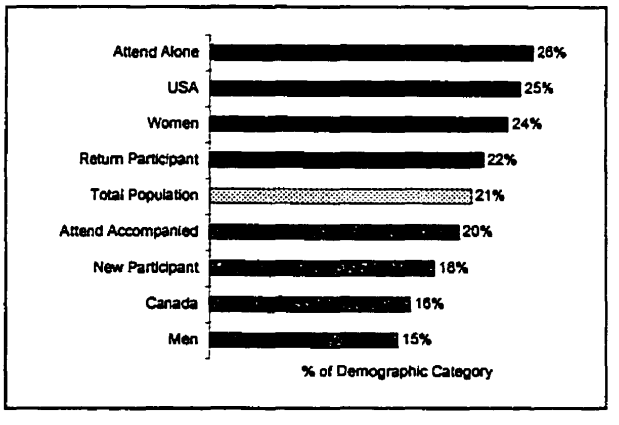
When examining the pure and major blended typology categories by demographic characteristic, some interesting differences emerge. To understand which subset of the population was most highly represented by each participant type, these divisions were examined individually and compared against the total population. Figure 28 illustrates these variables compared for the Explorer. Note that 26% of those who planned to attend alone could be identified as Explorers, whereas only 15% of all male participants fit this category. The darker shading above the total population represents those subsets that were higher than the total population, the alternate shading below identifies the subsets below the total population. This participant type most closely resembles Cohen's (1972) Explorer, although the definition and context here is different.

**Figure 28 The Explorer**



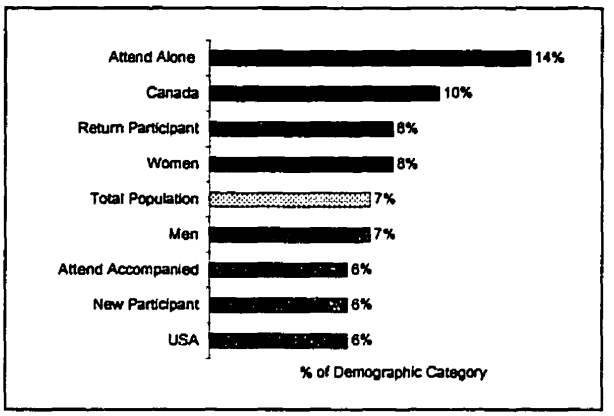

The Activity-Oriented however is quite different (Figure 29). Here 35% of all male participants, 35% of the new participants and 35% of those planning to attend with a companion were identified as Activity-Oriented. The fact that the new participant fits here is consistent with Arsenault's (1996) findings that reported many new participants (36%) choose programs with an activity component rather than pursue a specific content area. Comparing the percent of new participants in the Content-Committed illustration (Figure 30) one discovers a mere 6% fit this participant type.

**Figure 29 Activity-Oriented**



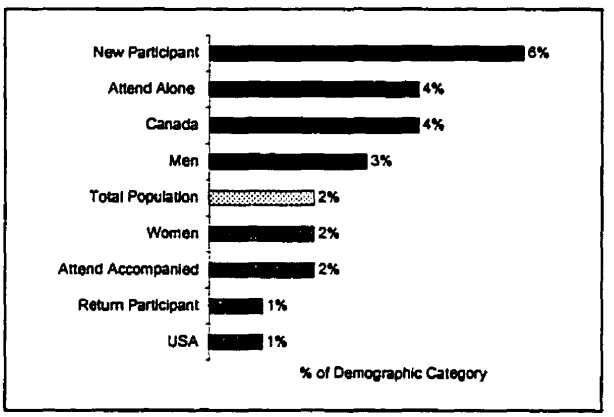
The Content-Committed participants, based on this sample, were primarily single, Canadian, female, return participants. One should read this statement with caution however because the percentage differences between the sub-populations are very small (e.g. women 8%, total population and men 7%).

**Figure 30 Content-Committed**




Two percent of the sample was identified as Experimenters. While this represents very few participants, the characteristic that dominated this type was the new participant (Figure 31). It was interesting to the researcher that 20% of the total population were first time participants (Table 16), yet only 2% were typed as Experimenters. To gain a better understanding of this finding, chi-square tests were run between the 19 cases identified as Experimenters with each demographic variable to determine if there were any statistically significant relationships. To the researchers surprise the enrolment variable was not statistically significant ($p = 0.84$, $df = 1$). Of the 19 Experimenters, 10 were new participants, nine were return participants. Where the statistically significant relationship was found was with the country variable ($p = 0.04$, $d f = 1$); 14 of the Experimenters were Canadian, only 5 American. This finding caused the researcher to reflect on the definition and label of the Experimenter. A review of the written comments and the subsequent multivariate analysis revealed that the 'close to home' aspect was reportedly the most important aspect of the vignette, in fact, there were no written references to feeling new or feeling somewhat nervous about 'going back to school'.

**Figure 31 The Experimenter**

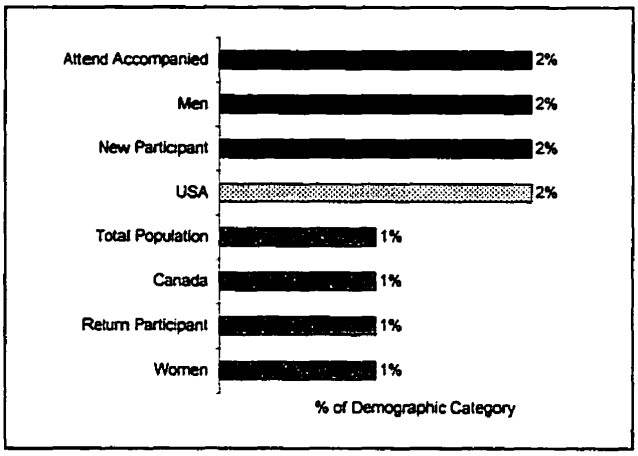



As a result of this new evidence in consideration of the previous findings (Arsenault, 1996) and expanded literature review, the researcher chose to retire the label **Experimenter** and replace it with **Convenience-Oriented, the term which will be used from this point forward.**

The Convenience-Oriented participant is now defined as the participant who is interested in finding an educational-travel program close to home.

There were very few Opportunists in this sample, 10 to be exact (1%). As Figure 32 illustrates, this type of participant is not predominant in any specific demographic subset of the population.

**Figure 32 The Opportunist**




The blended type that represented the largest 'blended' category was the Explorer/Activity Oriented (11%) and when examining the population subsets, there was very little difference between the categories. The second largest blended category was the Activity-Oriented/Content-Committed (4%) and again, the population subsets were very similar with one possible exception, the new participant.

### 4.4.3 Summary

Typologies are but one way researchers can attempt to segment participants to better understand those who are attracted to educational-travel programs. This section of the analysis has identified five types of older adult participants enrolled in an educational-travel program: the, Explorer, Activity-Oriented, Content-Committed, Convenience-Oriented, and the Opportunist. These five participant types will provide the framework for a multivariate analysis with the factors influencing program choice described in the next section.

## 4.5 Identifying the Factors Influencing Program Choice

The second research question in this study asked: **What are the critical factors influencing older adults in their choice of an educational-travel program?** The data from two multiple choice questions were calculated, three open-ended questions content analyzed, 52 Likert items factor analyzed, and the results triangulated to establish 18 factors influencing program choice. Overall, the response rate to the 52 Likert items was high with 99% of the sample responding to Item 3.3 (learning with people my own age), to a low of 91% for Item 3.41

(bed size). Responses to the open-ended questions were equally impressive; 98% elaborated on why they choose this specific program, 87% detailed why (or why not) they preferred to enrol at various times of the years, and 58% provided additional comments in Question 6.1.

Opting to triangulate different sources of data to arrive at the 18 factors influencing program choice was deemed important at this exploratory stage. Because, while a factor analysis is statistically parsimonious, as Boshier and Collins (1985) point out, "factor analysis merely structures a correlation matrix; it has nothing to do with the quality of the variables used as data input" (p.117). Rather than presume that the 52 Likert items included in this study captured the full range of factors influencing program choice, comparing and synthesizing the statistical findings with the written comments from open ended questions brought enriched meaning, understanding and will contribute to developing better instrumentation in the future. There is a limitation however to this approach because only those factors emerging from the statistical analysis could be used in the multivariate analysis.

To reach the conclusion that there were 18 factors influencing the program choices revealed in this sample, the following process was followed:

1. Descriptive statistics for all 53 items in Section 3.0 of the questionnaire were calculated using the original data records that allowed participants to circle one to five on a Likert scale *or* indicate that the item was not applicable. As only 81 participants responded to the open-ended Likert question (#3.53) it was excluded from further statistical analysis and the comments content analyzed (Appendix N). The number of people, per item, who indicated that it was not relevant to this program choice was recorded;

2. To prepare the database for the factor analysis, it was necessary to convert all *not applicable* scores (which were recorded as a #6 for data entry purposes ) to #1s, not important. This transformation was necessary because of the way SYSTAT dealt with missing data. Without the transformation, any respondent who circled N/A on even one of the 52 items would have been excluded from the factor analysis thus reducing the data base by approximately 75% (n = 161), a number too small to perform a factor analysis with the minimum number of five items per cell. While alternation of the data base enabled the factors to be calculated, the researcher cautions the reader that this may artificially lower the mean ($\bar{x}$) scores reported for

each factor and would recommend to future researchers to protect against this occurrence by increasing the sample size and using a stratified random sample. The percent of non-applicable responses per item is located in Appendix N, column 3;

3. The analytic options selected for the factor analysis included a principal component analysis with an orthogonal/varimax rotation. This option offers superiority in sharpening the focus and providing simpler structures for interpretation (Boshier, 1971; Johnson & Wichern, 1992; Kerlinger, 1986; Stevens, 1996). A total of 601 cases were used in the factor analysis, 210 cases were rejected due to missing data (not responding to one or more items). Fifteen factors, accounting for 61.9% of the explained variance, emerged from this analysis and, as per the loading criteria listed in chapter 3, individual items were assigned to the various factors. Appendix N contains the complete statistical details of the factor analysis including: the coefficients for each factor, the division of variance by factor, the cumulative variance and items that did not meet the loading criteria;

4. Factors were labelled and new variables created based on the 15 factors. The 52 individual items were retired from any further statistical calculations and the new 15 variables were tentatively labelled;

5. The open-ended questions were read, keeping the 15 factors in mind, an extended list of coding categories was constructed for future application (Appendix N);

6. The written responses to the fill-in-the-blank option with question 3.41 were summarised (Appendix N);

7. The results of the factor analysis were shared with 114 site co-ordinators, regional directors, and members of the national office staff to obtain their assistance in labelling the factors and to gain their insights about what these underlying constructs meant to them – the practitioner in the field;

8. A Pearson-Product correlation with the 15 factors influencing program choice was run, followed by calculating the means of the new 15 factor variables, and their Cronbach alpha statistic (Appendix N);

9. The 1,971 qualitative comments (from 3 open-ended questions) were categorized using the 15 categories emerging from the factor analysis plus the list of additional

themes emerging from step #6. Care was taken *not to reduce* the list of emergent themes prematurely because of the exploratory nature of the research. Due to the length and complexity of certain responses were identified using up to five different factor codes;

10. A series of multivariate analyses were then performed on the numeric data and following a period of reflection, as well, the results from the pilot study factor analysis (Appendix I) were revisited for comparative purposes;
11. The qualitative comments were re-read to ensure that each comment was properly coded by the researcher. A second person did not code the database.
12. This complete, the data base was sorted, the comments reviewed in detail and the decision was made to report 18 factors: 15 factors which were identified in the factor analysis and three additional factors that emerged from the content analysis of the open-ended questions;
13. Definitions for each factor were written;
14. The qualitative comments were then reviewed and re-coded using the 18 factors; and
15. Following a short period of reflection, the written comments were read one final time to ensure they were properly coded and salient quotations were extracted that would help illustrate the factors.

### 4.5.1 Factor 1: Social

"More than anything else, seniors want to meet people" (Lanquar, 1994 , p. 13). The desire to be part of a group, meet new people who share similar learning interests, and to have the opportunity to learn with same-aged people are all characteristics of the social factor. Georgette, a participant summed it up succinctly when she wrote,

> **Georgette:** We have found that people who choose Elderhostel are intellectually curious, eager to learn and share their own life experiences. We always learn a great deal more than the program listing.

Arsenault (1996) described this factor as the social fabric, the root of Elderhostel, the major strength of the organization. It binds participants together and it is at the heart of maintaining a strong interest for participants to return to Elderhostel. The social factor however is not new, it is frequently reported in the adult education, pleasure travel, and leisure studies literature in

participation and motivation studies (Adair & Mowsesian, 1993; Boshier, 1971; Cohen, 1972; Crompton, 1979; Cross, 1992; Henry & Basile, 1994; Morstain & Smart, 1974; Rice, 1986; Roberto & McGraw, 1990; Swedburg, 1991; Vandersluis et al., 1994; Woodside & Jacobs, 1985). Socializing is also reported by Statistics Canada (1997a) as a major activity in retirement.

In this study, four items clustered together in the factor analysis and accounted for the largest percent of explained variance (Table 27). Items 3.7 and 3.31 shared the highest mean score at 3.6 and the alpha coefficient for the social factor was strong (0.76). The essence of this factor is reflected in the words of Matthew, who stated that, "Elderhostel provides an excellent environment to meet/enjoy new people and gives us an opportunity to learn/expand in areas of general interest."

**Table 27 Factor 1 – *Social***

| Factor 1: Social[a] Percent of Explained Variance = 5.36%; $\alpha$ = -0.76 | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.21 | Being part of a group | 3.0 | .78 |
| 3.31 | Meeting new people | 3.6 | .72 |
| 3.25 | Learning with people my own age | 3.0 | .69 |
| 3.7 | Being with people who share my learning interest | 3.6 | .69 |

[a] 13 Items loaded ≤ .05 on this factor

[b] Item 26: Having a change from my daily routine loaded here at 0.47

## 4.5.2 Factor 2: Comfort

The comfort factor cuts to the heart of what Maslow (1954) would categorize primarily as physiological, lower order needs. The importance of finding a site that could accommodate basic needs, such as having a private toilet ($\bar{x}$ = 3.8) and a private bath ($\bar{x}$ = 3.7), was important to many hostelers. "More and more we care about the quality of the accommodations" wrote one 73 year old return participant. Table 28 presents the three items which loaded together to create the comfort factor that accounted for the second largest percent of explained variance (5.05%). Note that the factor loadings for private toilet and shower/bath facilities were extremely high, a

finding consistent with the pilot study that clustered these two items together with respective factor loadings of 0.92 and 0.87 (Appendix I).

In analyzing the written responses related to this factor, two new elements were revealed: personal comfort and safety. A number of participants, single and accompanied hostelers alike, made specific reference to these elements when responding to the final open ended question. For example, Jim, a 70-year-old gentleman travelling with his wife, wrote:

> **Jim:** Elderhostel makes me feel safe and eliminates the process of planning for the excursion. It is respected in the locale and country where held and the participants are made to feel welcome by the local people.

**Table 28 Factor 2 – *Comfort***

| Factor 2: Comfort[a] Percent of Explained Variance = 5.05; $\alpha = 0.79$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.50 | Private toilet facilities | 3.8 | .83 |
| 3.44 | Private bath/shower facilities | 3.7 | .83 |
| 3.11 | Studying at a commercial site (e.g. hotel, lodge) | 2.4 | .54 |

[a] 19 Items loaded ≤ .05 on this factor

[b] Item 41: Bed size loaded here at 0.40

Janice, a 69-year-old Elderhostel veteran, who has attended programs in Canada, the USA and abroad, wrote that "This is the first time I will attend Elderhostel alone and I know I will not feel alone or isolated." Similarly, retired Canadian and eight-time participant Liza commented:

> **Liza:** So far I have attended Elderhostel alone which does not bother me for I value the fact that I can go to any alone and still be part of a group. It's a wonderful feature and so important for a woman travelling alone. It is very comforting.

Finally Irene, a 56 year old widow, shared this sentiment when asked why she chose to enrol in the Fall 1997 Elderhostel Canada program. She wrote, "I lost my husband in March 97 and view Elderhostel as a safe, exciting and rewarding way to travel to interesting places."

The feeling of safety and comfort is commonly cited in the literature for people aged 55+, but in particular for women (Arsenault, 1996; Gibson, 1994; Hitchcock, 1994). The comfort factor does, however, extend beyond Maslow's lower order needs of physiological and safety. It

encompasses other personal choice options such as stay-over, arrive-early policies, a comfortable room, quality food, or as Roger, a 68 hosteler explains, "The Marshlands Inn is well known across Canada for its find cuisine as well as being a first class inn."

### 4.5.3 Factor 3: Location

The influences of geographical attractions, area assets, and cultural attributes on program choice are key elements of the location factor. The motivations behind choosing a location were as varied as the participants, however some common threads were seen in the descriptive data. One thread was nostalgia as Amanda, a 67-year-old Californian retiree, explains:

> **Amanda:** As a research biologist I spent 3 summers in Churchill Manitoba (1952 – 1954) and I have always wanted to return. I thought that it would be fun to see what the winter/fall would be like.

For others, choosing a program based on the location means an opportunity to fulfil, "a dream of a lifetime to see and experience the Banff and Lake Louise area and to learn more about it" to enjoy a cultural experience in a large city such as Toronto, to see and learn more about Canada and its special attractions (e.g. the northern lights) and, as Genevieve writes, "We wanted to see and learn about the tides in the Bay of Fundy and visit a part of Canada we've never seen."

An analysis of the mean scores revealed that items 3.24 and 3.28 had very strong factor loadings and relatively high mean scores (Table 29).

**Table 29 Factor 3 – *Location***

| Factor 3: Location[a]<br>Percent of Explained Variance = 4.98; $\alpha = 0.73$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.24 | Satisfying a curiosity about a geographic area | 3.9 | .81 |
| 3.28 | Exploring a particular geographic area | 3.8 | .81 |
| 3.15 | Experiencing a different culture | 3.3 | .53 |
| 3.10 | Finding a program that included educational field trips | 3.7 | .53 |

[a] 19 Items loaded ≤ .05 on this factor

[b] Item 32: Learning something new loaded here at 0.42

Knowing that Elderhostel is an educational-travel program, it was not surprising to discover that when participants were asked **why** they chose their particular Fall 1997 program, the majority identified location as being important or described some related feature. The only other factor that was mentioned as frequently was program, and often they were intertwined as the responses from Jennifer and Harriet illustrate:

> **Jennifer:** I have never been to Nova Scotia and it sounded like an interesting place to visit. The courses appear to offer a deeper understanding of the area.
>
> **Harriet:** It provides an opportunity to visit the Rockies again. It offers educational presentations on ecology, history and hotel operations. It also provides the opportunity to socialize with like-minded people.

### 4.5.4 Factor 4: Attend Alone

The decision to enrol alone in an Elderhostel program (as opposed to attending with a companion) brings with it some unique considerations. Recall that 21.1% planned to attend alone and therefore the availability of single rooms, single beds and the additional cost of the single supplement are all factors to be considered by the single hosteler when selecting a program. Table 30 displays the items that loaded on this factor. These accounted for 4.98% of the explained variance.

**Table 30 Factor 4 – *Attend Alone***

| Factor 4 : Attending Alone[a]<br>Percent of Explained Variance = 4.98; $\alpha = 0.69$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.27 | Availability of single beds | 2.7 | .73 |
| 3.51 | The cost of a single room | 2.3 | .72 |
| 3.37 | Availability of single rooms | 2.4 | .68 |

[a] 14 Items loaded ≤ .05 on this factor

[b] Item 23: Accessibility by bus or train loaded here at 0.44

The elements that loaded together to create this factor were not isolated and labelled as a separate factor in the previous study, however all the elements described here, and witnessed in the qualitative comments, were consistent with Arsenault's (1996) previous findings.

### 4.5.5 Factor 5: Attend Accompanied

This factor is defined as the need to select or negotiate a final program choice based on the combined needs and interests of two or more participants who want to attend an Elderhostel program together. As 78.9% of the participants in this study planned to attend with one or more companions, examining joint decision-making within an educational-travel context becomes an exciting research possibility for the future.

The three items that clustered together to create this factor are presented in Table 31. They are the exact three items that clustered together in the pilot study with similar factor loadings (Appendix I). In terms of the inter-correlation between items, this factor had the highest alpha coefficient at 0.82. The first item, agreeing on an Elderhostel with my travel companion, had a mean score of 4.2, followed by finding a shared interest with my travel companion (4.0), and finally co-ordinating dates with a travel companion (3.6). Items 3.18 and 3.8 ranked fifth and sixth respectively as the items with the highest overall means among the 52 items.

**Table 31 Factor 5 – *Attend Accompanied***

| Factor 5: Attend Accompanied<br>Percent of Explained Variance = 4.45; $\alpha = 0.82$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading |
| 3.18 | Agreeing on an Elderhostel with my travel companion | 4.2 | .82 |
| 3.8 | Finding a shared interest with my travel companion | 4.0 | .80 |
| 3.20 | Co-ordinating dates with a travel companion | 3.6 | .80 |

[a] 19 Items loaded ≤ .05 on this factor

A number of the qualitative comments illuminated the negotiation process. Indeed, the written words resonated with the researcher who spent several weeks in the field, as a participant observer in the previous study. To illustrate, the comments of two hostelers are presented.

> **Francine:** My husband and I have a custom of taking turns choosing one Elder-hostel program each year, but there is a lot of negotiating even when it is my turn.
>
> **Loralee:** It was one of several discussed with my travelling companion. We liked the location first, and of lesser importance was the program and timing.

Although 83% to 94% of all people travelling with a companion reported making a joint decision, there were those like John who wrote that "my wife chose this program and it appealed

to me." Similarly, one 66-year-old gentleman, who was travelling with his 79-year-old wife and another couple, stated that:

> We are going with another couple who wanted to go to Nova Scotia. This is our first Elderhostel but the couple we are going with has gone to several.

### 4.5.6 Factor 6: Activity

Today's older adults are considerably more physically fit than their predecessors are (Lanquar, 1994). In fact Statistics Canada (1997a) reports that 47% of all seniors engage in regular physical activity, 14% participate occasionally . As Brenda, a 67-year-old from British Columbia wrote,

> In order to stay healthy, I have to be active, so I choose Elderhostels with lots of activity, preferably outdoors.

Accounting for 4.26% of the variance, three items loaded on this factor and supported Arsenault's (1996) claim that certain participants are attracted to programs with a physical activity or outdoor component (Table 32). The following quotations explain,

> **Rita:** I find a program including an exercise such as Tai Chi appealing, it lends diversity to the day. Combined with photography, it allows me to get outdoors and enjoy the scenery too.
>
> **Walter:** Although hiking is not included in the program, the fact that the Kananaskis area offers this opportunity was a deciding factor in our selection. We expect to do some hiking during free time.

**Table 32 Factor 6 – *Activity***

| Factor 6 : Activity[a] Percent of Explained Variance = 4.26; $\alpha = 0.72$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading |
| 3.17 | Seeking a high level of physical activity | 2.2 | .80 |
| 3.29 | Finding a program with a sports option | 1.8 | .70 |
| 3.2 | Finding a program that involved being outdoors | 3.3 | .67 |

[a] 3 % indicated this item was not applicable

Despite the fact that 60% of the people aged 65+ are not physically limited (van Harssel, 1994), this still leaves 40% of a growing population who are. The interesting new dynamic that emerged in the qualitative comments were the number of people who made specific reference to **avoiding** Elderhostel programs that involved physical activity or sports, particularly

winter sports. In fact, 14.7% of the respondents indicated that finding a program with a sports option was not relevant to their program choice (Appendix O). A review of the mean scores in Table 32 shows that, finding a program that involved being outdoors had a higher mean score which suggests perhaps, the emphasis on sports which Arsenault (1996) reported, was too strong and the Activity factor is related to finding a balance between the amount and type of physical and outdoor.

### 4.5.7 Factor 7: Information

Program selection is influenced by a variety of information sources such as the catalogues produced by Elderhostel in the USA and Canada, word of mouth recommendations from family, friends and fellow hostelers, affiliates of the organization and the Internet. When participants were queried about which information sources influenced their program choice, the Canadian (68.4%) and American (35.0%) Elderhostel catalogues were cited most frequently (Table 33). This finding is consistent with a study done by van Harssel (1994), for the American Association of Retired Persons (AARP) who found that program brochures had the strongest influence on seniors, more than the reputation of the company or past experience.

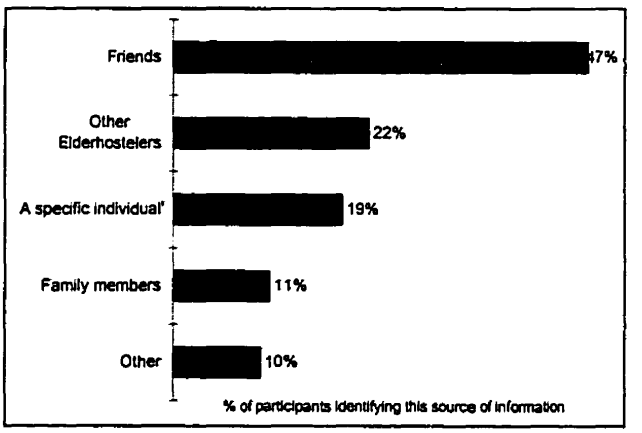
**Table 33 Sources of Information**

| Source of Information | n = | Percent |
|---|---|---|
| The Canadian Elderhostel catalogue | 555 | 68.4 |
| The USA Elderhostel catalogue | 284 | 35.0 |
| A word of mouth recommendation | 109 | 13.4 |
| Other | 78 | 9.6 |
| Information found on the Internet | 10 | 1.2 |
| An Elderhostel staff member | 5 | 0.6 |

Sources of information used less frequently included word of mouth recommendations (13.4%) and information on the Internet (1.2%). The fact that only 1.2% used the Internet to obtain program information is interesting because 8.9% of the people surveyed have access to the Internet for they provided an e-mail address and requested to receive their summary of the research findings electronically. As technology advances and baby boomers look towards Elderhostel as an option, one can predict that the use of the Internet as an alternate source for program information will increase. In fact, Smith and Clurman (1997), marketing experts on how trends affect business, wrote that on-line marketing is worth considering if you are targeting

Baby Boomers. A point which resonated with the researcher who was asked during the pilot study and previous study about the long-range intentions of Elderhostel in offering electronic information and registration.

**Figure 33 Word of Mouth Recommendations**




The majority of the word of mouth recommendations came from friends, other hostelers and family members (Figure 33). Specific names of individuals were provided by 19.4% of the respondents but because of the way the question was constructed, one cannot tell in which category these people belong. In reviewing the written responses to the 'other' category (completed by 9.6% of respondents), the additional information sources identified included, television shows, information sessions, and different print media such as magazines and newspapers.

The number of items relating to information sources was limited in the factor analysis because of the decision to obtain specific details using a multiple choice and fill-in-the-blank question format. Nonetheless, as Table 34 illustrates, two of the three items that were anticipated to load on the information factor did. A third item – descriptions in the Elderhostel catalogue – that the researcher anticipated would load here but it did not. Rather, it loaded on the organizational attributes factor suggesting that there may be a perceptual difference between print material produced by Elderhostel and external information sources such as personal endorsements or newspaper articles.

**Table 34 Factor 7 – *Information***

Factor 7: Information[a]

Percent of Explained Variance = 4.03; $\alpha = 0.56$

| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
|---|---|---|---|
| 3.39 | Advice from Elderhostel site co-ordinators or employees | 2.9 | .68 |
| 3.49 | Word of mouth recommendation | 3.0 | .64 |

[a] 6 Items loaded ≤ .05 on this factor

[b] Item 40: A choice of 3 different courses at one site loaded here at 0.44, item 41: Bed size loaded here at 0.44, item 47: The reputation of the Elderhostel site loaded here at 0.41

## 4.5.8 Factor 8: Cost

Cost was the eighth underlying construct created by loading together the three items listed in Table 35. In terms of relative influence on the Likert scale, the registration fee, and the cost of travelling to and from the site were rated as having more influence on program choice than the Canadian dollar exchange rate.

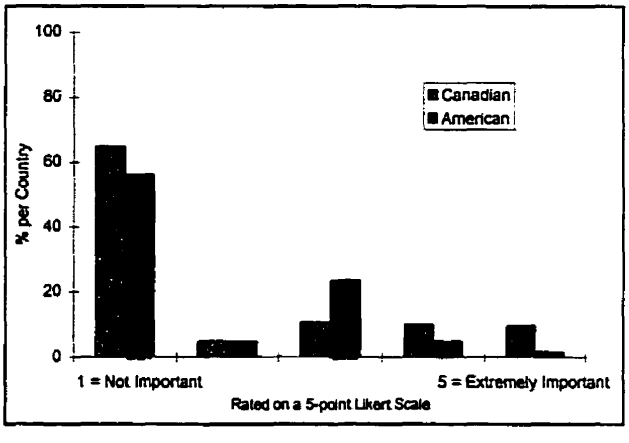
**Table 35 Factor 8 – *Cost***

| Factor 8: Cost[a] Percent of Explained Variance = 3.95; α = 0.63 | | | |
|---|---|---|---|
| Question | Description | Item Mean Score | Factor Loading |
| 3.38 | The cost of travelling to and from the site | 2.8 | .76 |
| 3.48 | The program registration fee | 3.0 | .70 |
| 3.42 | The Canadian dollar exchange rate | 2.2 | .66 |

[a]21 Items loaded ≤ .05 on this factor

Out of curiosity, the researcher ran a chi-square between these individual items and the nation variable to see if cost was a greater consideration for Canadians or Americans. The chi-square between nation and the Canadian dollar exchange rate ($p < .01$, $df = 4$) revealed that 64.9% of all Canadians rated this item as '1 - not important' on a 5-point Likert scale com-pared to 56.0% of Americans (Figure 34).

**Figure 34 Importance of the Canadian Dollar Exchange Rate**

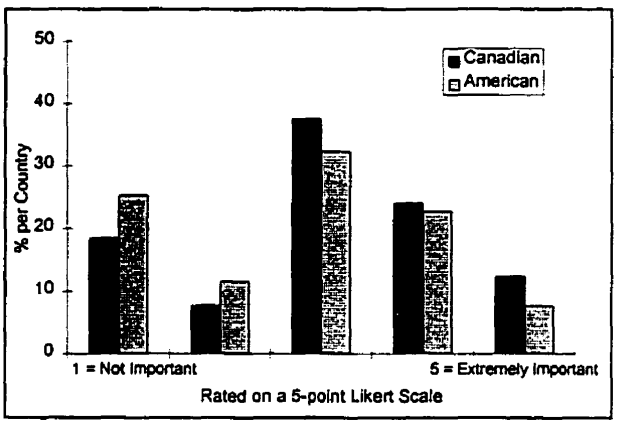



The opposite however was true for 9.6% of the Canadians who rated the Canadian dollar exchange rate as extremely important compared to only 1.5% of Americans. What this finding suggests to the researcher is the presence of an inverse relationship between Canadians and Americans participants. For Canadians to choose a program in the USA, they loose money on their dollar, and hence the exchange rate is a consideration. For Americans who come to Canada, their dollar is increasing in value by approximately 40% and therefore has less of an effect on program choice.

A review of the written responses supported this financial concern. All but one of the written comments relating to the cost factor were from Canadians. The range of concerns included only being able to afford Canadian programs, choosing a program near home because of limited financial means, not wanting to duplicate seasonal expenses for those renting winter accommodations in the southern USA, and health insurance costs incurred when travelling to the USA.

No statistical difference was found between Canadians and Americans concerning the cost of travelling to and from the site, however the chi-square between program fee and nation ($p = 0.02$) revealed that overall Canadians were more concerned with the cost of the program (Figure 35).

**Figure 35 Importance of Program Fee**




## 4.5.9 Factor 9: Program

Three items loaded on the program factor. It ranked in ninth place in terms of explained variance (Table 36). Item 3.3 had one of the highest mean scores of all 52 items. Interestingly though, the item 'learning something new' which had the highest mean score (4.4) did not load on a factor. The researcher anticipated this item to load was here, on the program factor, as it did in the pilot study. In terms of the inter-item correlation ( $\alpha = 0.57$) this factor was the fourth weakest which surprised many of the Elderhostel Site Co-ordinators, who had the opportunity to comment on the preliminary findings. To them, the program factor seemed "low on the totem pole" ($9^{th}$ out of 15) when rank ordered by explained variance.

It was most interesting to the researcher when, at three separate presentations (total attendance 114) of the preliminary findings, two questions emerged with the exact same themes:

> **Question 1:** If Elderhostel is an educational-travel program, then why is the program factor not ranked higher with the other important factors such as location, social, and comfort?
>
> **Question 2:** If learning something new is so important to the majority of participants, why did it not load on a factor?

**Table 36 Factor 9 – *Program***

| Factor 9 : Program[a] Percent of Explained Variance = 3.85; α coefficient = 0.57 | | | |
|---|---|---|---|
| Question | Description | Item Mean Score | Factor Loading[b] |
| 3.16 | Following a program with one learning theme | 2.4 | .70 |
| 3.1 | Studying a specific topic | 3.5 | .67 |
| 3.3 | Expanding my knowledge | 4.2 | .57 |

[a] 25 Items loaded ≤ .05 on this factor

[b] Item 4: Studying at a college or university loaded here at 0.48

Two excellent questions stemming from a curious combination of findings and worth a brief discussion here to attempt to unravel the mystery, for this is critical information to those who plan, administer, and market educational-travel programs.

In a recent paper presented at the Global Classroom Conference in the Netherlands (Arsenault et al., 1997), the researcher wrote of an important discovery emerging from the MA study – the distinction between program choice and venue choice. Prior to selecting a program, participants seek out and assess the various attributes of different organizations, agencies, or institutions that offer educational-travel programs. For the participants in this study, the preferred venue was Elderhostel. In triangulating the findings of the factor analysis with the written comments, the researcher believes that this distinction between venue choice and program choice has resurfaced, albeit not well articulated because this study was designed to query program choice, not venue selection. It is an ideal focus for future research.

## 4.5.10 Factor 10: Personal Limitations

The need to accommodate a personal limitation (e.g. difficulty walking long distances) may influence the program choice of an educational-travel participant of any age, however when catering to an older adult population, this factor may at some point become a permanent consideration impacting on program choice. As one hosteler shared, "I was recently diagnosed with multiple sclerosis so my active trips are limited." Others wrote of chronic ailments such as increased arthritic pain, the onset of a hearing impairment, or a car accident that rendered them physically challenged. In fact Statistics Canada (1997a) reports that 3.7% of all people over the age of 55 (living in a private dwelling) experience some level of activity restriction due to health (e.g. 24% are forgetful, 8% have a vision problem, 6% a hearing problem).

Not all limitations however were reported as debilitating, as 70 year old Sandra explained, "I have recently had surgery, which affects my walking. Hopefully this will not be a consideration in the future." Table 37 lists three items that loaded on the personal limitation factor ($\alpha = 0.67$). The mean score for the three items was low, affirming that the majority of Elderhostelers did not perceive themselves to be limited. Still, it is an important consideration for a subset of the population. In fact, by examining the number of people who circled 4 or 5 (on a 5-point scale) we learn that 5.5% of the participants indicated a need to accommodate a sensory limitation, 9.8% needed to find a program with minimal physical activity, and 13.5% identified that accommodating a physical limitation (e.g. difficulty walking) was important when selecting this particular program. As the longevity of men and women increases it will be interesting to monitor these limitations within the general population to see if they increase or decrease with future generations of Elderhostelers.

**Table 37 Factor 10 – *Personal Limitation***

| Factor 10: Personal Limitation[a] Percent of Explained Variance = 3.81; $\alpha = 0.67$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading |
| 3.22 | Accommodating a physical limitation (e.g. walking) | 2.0 | .81 |
| 3.5 | Finding a program with minimal physical activity | 1.9 | .72 |
| 3.34 | Accommodating a sensory limitation (e.g. hearing) | 1.5 | .65 |

[a]17 Items loaded ≤ .05 on this factor

## 4.5.11 Factor 11: Escape

The need to escape is commonly reported in both the adult education and pleasure travel literature, albeit not a deciding factor the majority of participants (Arsenault, 1996; Boshier, 1971, 1991; Crompton, 1979; Cross, 1992; Etzel & Woodside, 1982; Muller, 1994; Rice, 1986). Two items met the loading criteria for this factor and as Table 38 indicates, they were strongly inter-correlated ($\alpha = 0.81$).

A review of the written comments revealed that the majority of participants wrote of a need to **get away,** an item worth including in a revised instrument. Other items that emerged frequently included the need to break away or escape the cold winter in Canada or the northern

**Table 38 Factor 11 – *Escape***

| Factor 11: Escape[a] Percent of Explained Variance = 3.71; α = 0.81 | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.6 | Forgetting personal worries | 2.1 | .84 |
| 3.19 | Forgetting responsibilities at home | 2.2 | .83 |

[a] 23 Items loaded ≤ .05 on this factor

[b] Item 26: Having a change from my daily routine loaded here at 0.47

United States, an interest in escaping the dullness of winter, and wanting to visit a warmer climate. There were even isolated cases, reported by people in Maine and New Hampshire, of enrolling at certain times of the years to escape black fly months at home! Finally, although less than 15% work full or part-time, for those that do, Elderhostel provides an escape as Valerie explains: " I am self-employed and Elderhostel is an excellent place to escape to from the pressure of business. It is relaxing, but still stimulating."

## 4.5.12 Factor 12: Travel

This factor relates to, what is referred to in the pleasure-travel literature, as multi-destination travel – a rational behaviour pattern that reduces the time and cost associated with travel, therefore increasing the potential benefits (Lue et al., 1993)., Lue and his associates report that between 30% and 50% of all trips are multi-destination yet a single destination mentality is often retained since it is simpler.

The influence of multi-destination within an education-travel context of choosing a program is simple. Participants who plan to visit family or friends, take a vacation, or attend a reunion in a particular geographical area will reduce the number of sites considered to those within a complementary distance of their existing travel destination (Table 39).

The following statements by 76 year old Maria and 70 year old Wanda, both return participants, help to illustrate,

> **Maria:** I selected this program because I have a grandson in the navy in Victoria so it will serve two purposes – experiencing Elderhostel and visiting.
>
> **Wanda:** I am a world traveller and free to go where I please. I often combine Elderhostel programs with other travel purposes.

**Table 39 Factor 12 – *Travel***

| Factor 12 : Travel[a] Percent of Explained Variance = 3.63; α = 0.51 | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.36 | Visiting family or friends in the local area | 2.0 | .71 |
| 3.33 | Taking a holiday before or after Elderhostel | 2.5 | .70 |

[a] 19 Items loaded ≤ .05 on this factor

[b] Item 35: Attend 2 or more Elderhostel programs 'back to back' loaded here at 0.46

Likert item 3.35 (attend two or more Elderhostel programs back-to-back) almost loaded on this factor (0.46) but, only 7.2% of the population rated this item as extremely important (4 or 5 on the 5-point Likert scale). This means it is important to only a small slice of the total sample. The written comments, however emphasized that the opportunity to enrol in consecutive programs was desirable, as Betty explains.

> **Betty:** We like to do two back-to-back Elderhostels in the fall and two consecutive ones during the winter months. The fall ones we choose to include fall colours and the winter ones in some place relatively warm.

The fact that some participants program choice is influenced by the desire to enrol in two or more consecutive programs is consistent with what Arsenault (1996) described as an **Elderhostel vacation** – a desire to justify greater travelling distances and increased costs by attending more than one program within a similar geographical area. So while this factor accounted for only 3.6% of the explained variance, it beckons further attention. A future qualitative study could explore this dynamic in further detail then in an effort to understand the concept of multi-destination travel as it pertains to the educational-travel participant.

## 4.5.13 Factor 13: Organizational Attributes

Organizational attributes accounted for 3.58% of the explained variance. The two items that loaded on this factor were highly correlated (α = 0.71) and their mean scores were among the highest (Table 40).

**Table 40 Factor 13 – *Organizational Attributes***

| Factor 13 : Organizational Attributes[a] Percent of Explained Variance = 3.58; α = 0.71 | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading[b] |
| 3.45 | The reputation of Elderhostel | 4.3 | .79 |
| 3.46 | Descriptions in the Elderhostel catalogue | 4.3 | .77 |

[a] 22 Items loaded ≤ .05 on this factor

[b] Item 47: The reputation of Elderhostel loaded here at 0.42

The majority of the qualitative comments were positive, as retired professor Brian writes, "Elderhostel gives me an experience that cannot be duplicated anywhere else on the earth." There were however, criticisms against Elderhostel that were related primarily to cancelled programs or a disappointing experience as Francine explains.

> **Francine:** My only negative Elderhostel experience in Canada was the YMCA in ____. It was dirty, uncomfortable and the staff were indifferent or absent. This was however, some years ago.

## 4.5.14 Factor 14: Accessibility

Decisions related to the travel distance, method of transport, and ease of access in reaching the Elderhostel site (host destination) are important elements that are considered when selecting an Elderhostel site (Table 41).

**Table 41 Factor 14 – *Accessibility***

| Factor 14: Accessibility[a] Percent of Explained Variance = 3.40; α = 0.61 | | | |
|---|---|---|---|
| Question | Description | Item | Factor Loading |
| 12 | Accessibility by car | 2.6 | .73 |
| 14 | Driving to the site in less than 6 hours | 1.9 | .60 |
| 30 | Accessibility by airplane | 2.6 | -0.50 |

[a] 22 Items loaded ≤ .05 on this factor

This combination of attributes reinforces a major theme that emerged in the MA study relating to what participants referred to as the **'one-tank-trip'** phenomenon.

> The one-tank-tripper describes those who look for a program or subject of study in their own backyard. The distance travelled equals the distance you can go on one tank of gas. Generally speaking the participants identified this as four to six hours of driving time (Arsenault, 1996, p. 50).

Testimony to the importance of the one-tank-trip decision was also found in the open-ended question that asked: Why did you select this particular program? Numerous comments reflected the fact the Elderhostel site was near home, within a driving distance, it's easy to get to, and as Marjorie wrote "I prefer programs that are at a reasonable distance (no plane or train) since travelling expenses can be quite high."

Note that accessibility by airplane loaded negatively on this factor (-0.50) and accessibility by bus or train did not load here at all. This combination of evidence suggests to the researcher that indeed the 'one-tank-trip' phenomenon does exist and although it only accounts for 3.4% of explained variance.

The concept of segmenting markets based on the distant and near-home travellers is not new to the pleasure-travel literature and represents an important variable worthy of further study (Etzel & Woodside, 1982). In fact, Etzel and Woodside's research concluded that, while the near-home and distant traveller did not differ significantly on the purpose of the trip, the distant traveller indicated higher interest levels in benefits related to intellectual and social stimulation as well as the opportunity to have an adventure, once-in-a-lifetime opportunity, and a change of pace. In contrast, the near-home traveller sought a more relaxed, slower pace, related more to recuperation than stimulation. Revisions to the instrument for future use should include more items to test the robustness of this factor.

### 4.5.15 Factor 15: Previous Experience

Past experience influences future choice, a fact well researched in the consumer behaviour literature (Kindra et al., 1994). The final factor emerging from the statistical component of the analysis on decision-making is related to previous experience. Although it accounts for the smallest portion of explained variance (Table 42) and the inter-correlation is weak ($\alpha = 0.55$), the volume of written comments gives credence to this factor. The sentiment recorded by Liza reflects the positive tone of many comments that were received. She wrote,

**Liza:** I have attended previous Elderhostels at this location with this instructor. I find this instructor to be very good and the accommodation and location are quite satisfactory. Also quite easily accessible.

**Table 42 Factor 15 – *Previous Experience***

| Factor 15: Previous Experience [a] Percent of Explained Variance = 3.28; $\alpha = 0.55$ | | | |
|---|---|---|---|
| Question | Description | Item $\bar{x}$ | Factor Loading |
| 3.43 | A previous positive experience at a site | 2.9 | .71 |
| 3.52 | A previous positive Elderhostel Canada experience | 3.5 | .69 |
| 3.9 | Returning to a specific site | 2.6 | .56 |

[a] 25 variables loaded ≤ .05 on this factor

## 4.5.16 Factor 16: Dates

Dates and seasonal influences (Factor 17) have an impact, to varying degrees, on the choice of an Elderhostel program. In the preceding study Arsenault (1996) reported seven elements related to dates within a single factor:

1. Desire to avoid tourist season;
2. Preference to stay at home when the weather is warm;
3. Seek out a particular type of weather; warm in winter, cool in summer;
4. Co-ordinate vacation with employer (for those not fully retired);
5. Finding time in a busy retirement schedule of activities;
6. Personal preference for travelling during a specific time of year; and
7. Only available to travel during a specified period of time.

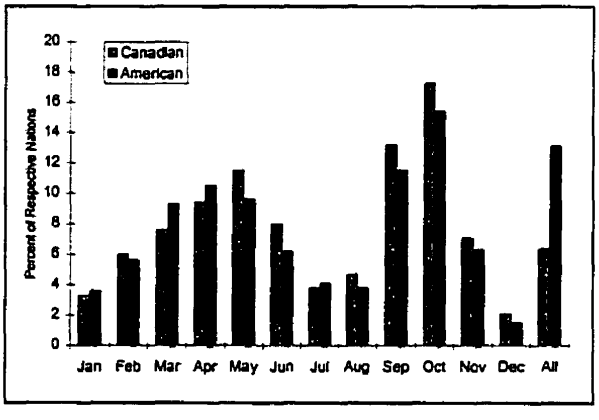
The evidence gathered in this study suggests that dates and seasonal influences should be separated as two distinct factors.

To determine when participants preferred to enrol with Elderhostel, a 12 month calendar was provided and respondents were and asked to circle their favourite months for attending. A 13th option, 'All' was also available for those who were interested and able to enrol any time of

the year. An open-ended question followed the calendar that permitted participants to elaborate or justify the months they circled on the calendar. This combination of a visual calendar and a written response was recommended by seniors at the McGill Institute for Learning in Retirement who helped develop the questionnaire. Following this advice was wise, for the question format was well received. The calendar component yielded a 93.8% response rate and 87.0% of the respondents included rich, diverse, and highly informative written explanations.

October was identified by both Canadians and Americans as the most popular month followed by September and May (Figure 36). In terms of seasonal preferences, the spring and fall were favoured over summer and winter, a point confirmed in the written responses and consistent with Arsenault (1996). One must be cautioned however against making any generalizations on these statistics alone, for this study only queried people who had registered in a fall program. Had this study sampled participants enrolled in programs in all four seasons, these findings could be different.

**Figure 36 Favourite Months to Attend an Elderhostel**




The majority of the respondents (62.7%) circled one or more months on the calendar, 31.1% indicated all months were possible, 6.2% did not respond. Appendix P offers complete details on the breakdown concerning the number of people who circled one month through eleven months. Bar charts were also created to allow comparisons between those who circled different combinations of months. Not surprising, of all those circling one-month only, the months indicated were October or November (one exception). Participants who circled 2, 3, 4, 5 or 6 different months showed a distinct preference for the spring and fall and participants who circled 7 or 8 months leaned specifically towards April through October. It was interesting to note that those who circled 9 or 10 months were least fond of July and August and the few participants who circled 11 out of 12 months did not want to attend Elderhostel in December.

One third of the study population indicated that they were available any time of the year to attend Elderhostel and several written comments reflected this availability.

**Rhonda:** The time of year makes little difference to me. The subject matter is what counts.

**Brent:** Time of year is not a deciding factor.

**Dylan:** I am free to travel in all seasons, and learning about the world we live in is not limited to a specific time of year.

**Sandra:** I am a naturalist so all seasons are important for being outdoors and active and observing nature.

Not all comments however were general. Certain individuals, like 66 year old Elaine who was travelling with her husband, were more descriptive:

**Elaine**: January for southern sites, March and April = spring weather, Oct = fall colours and few tourists on the highways.

Additionally, a significant number of people made reference to seasonal influences, in particular the influence of weather and seasonal activities such as gardening or snow birding. Due to the richness of the data base, and because this is exploratory research, it was felt at this stage that reporting two factors was most prudent. Future investigations examining the choice of an educational-travel program will want to continue exploring this dynamic.

### 4.5.17 Factor 17: Seasonal Influence

A thorough content analysis of the written responses revealed several distinct themes that clustered together to create the seasonal influence factor. The range of themes includes the influence of weather, holidays, seasonal activities (e.g. gardening and golf), family visit, travel conditions, off-season travel benefits, health reasons, the need to escape, the need to remain at home, and seasonal preferences based on the types of activities only available at certain times of the year (e.g. migration of the polar bears).

To organize the data, a framework of push factors, pull factors, and deterrents, was used. Recall from Chapter 2 that push factors relate to socio-psychological motives, and as witnessed here, physiological needs of the participant. Pull factors, in contrast, relate to the motivations aroused by the attributes of the destination or educational-travel program. Deterrents are reasons why one is unable or disinterested in enrolling with Elderhostel during a specific season or time of year. A sample of the range of the participant comments is presented in Table 43.

What this content analysis revealed is that any given attribute, for example weather, can be a pull factor, a push factor, or a deterrent depending on the participant. Alas, it is beyond the scope of this study to do more than report this finding. However, future studies may consider

using a framework that examines the push-pull factors by season for educational-travel programs.

### 4.5.18 Factor 18: Work

The final factor, one that was not addressed in the factor analysis, is relevant only to roughly 15% of Elderhostelers – those who are employed full or part-time. Like the other factors that affect only subsets of the population, (attending alone, personal limitation, interest in physical activity), participants who work have a unique list of elements that synthesize together and have an impact on program choice. The first relates to seasonal employment, for example people who operate a summer bed and breakfast or for contract employees who work only during the tax season. The second influence relates to vacation time entitlement, finding an Elderhostel that is suitable during one's designated vacation period, or conversely first selecting an Elderhostel then attempting to arrange leave from work. Finally, for some there may be a possibility "to fit Elderhostel in with a business trip we had planned." While this final element shares aspects of a multi-destination trip as in the Travel factor, it has been clustered here for it does not reflect pleasure travel, but business travel, a distinction that clearly exists in the travel research literature.

### 4.5.19 Summary of the Decision-Making Factors

The preceding section reported on the analysis that identified the factors influencing the choice of an educational-travel program. Through the use of factor analysis, content analysis, and descriptive statistics, the 18 factors were found to influence program choice, four more than reported in the previous study (Arsenault, 1996). Table 44 provides a synthesized list of these factors, complete with a definition for each.

**Table 43 Push, Pull and Deterring Factors**

| Type of Factor | Select Quotations |
|---|---|
| Push Factors | |
| • Avoid home climate | I like to go south in the winter (Jan –Feb) because I can't take the northern winters, which last forever. |
| • Family | Somewhere cool in the summer, somewhere on my way to visit my son. |
| • Seasonal Activity | We like to travel in the fall while the weather is still nice but the vacationers are mostly gone. |
| • Health | I wish outdoor seasonal activities. |
| • Escape | Spring is a great time to leave Michigan. |
| | I prefer the winter and fall months as I have health problems with the heat |
| Pull Factors | |
| • Location | Long-time interest in visiting Churchill in polar bear season. |
| • Program | Living in California it's a treat to experience the fall and winter seasons (in Canada). Also much less traffic as we travel by car. |
| • Weather | I am looking forward to experiencing the beauty of winter in the Jasper mountains. |
| • Personal interest | Program sounded exciting, northern lights. I like cold weather and remote places. A chance to see a part of Canada where I have not been before. |
| • Lower costs | We have found that we love to travel in Canada in the fall. |
| • Easy access to the site | |
| Deterrents: | |
| ▪ Seasonal | Our personal, family and volunteer activities are heavy during the summer. |
| ▪ Weather | We have basketball season tickets for games from mid Nov to the end of March |
| ▪ Type of Programs | As a rule I try to avoid extremes in temperatures. |
| ▪ Personal | In the winter I do not want to leave my house (freezing, etc.). |
| ▪ Road conditions | I do not make travel plans in the winter because of the ice and snow. Travelling is more hazardous during the winter months. |
| ▪ Undesirable weather | Jan – March Ontario programs usually have sports predominating, skiing, snow shoeing, etc. which I 'm unable to do. |
| ▪ Vacation traffic | Our cottage is the most wonderful place in the world to be between Easter and Thanksgiving almost every day. |
| ▪ Seasonal cost differences | I do not like to travel during the summer because of crowds and higher rates for transportation. |
| ▪ Family commitments | I like to be home in the summer as my children and family visit then more often. |
| | Avoid conflicts with family events; birthday, Christmas, and Thanksgiving. |

**Table 44 A Summary: Factors Influencing the Choice of an Educational-Travel Program**

| # | Factor | Defined as: |
|---|---|---|
| 1 | Social | The human attributes one seeks when selecting a program, including the opportunity to meet people with similar interests, shared intellectual stimulation, and learning with same-aged people. |
| 2 | Comfort | The decision to enrol at a particular site based on the personal comfort attributes available such as private bath facilities. |
| 3 | Location | The influence of the geographical attractions, area assets, and cultural attributes on program choice. |
| 4 | Attend Alone | Decisions unique to the participant, who plans to attend the program alone. For example, the cost of a single supplement for a private single room. |
| 5 | Attend Accompanied | The joint decision-making process required to negotiate a final program choice based on the combined needs and interests of two or more participants who plan to attend together. |
| 6 | Activity | Decisions related to the amount of learning that will occur outdoors or involve physical activity. |
| 7 | Information | The influence various information sources have on program choice. |
| 8 | Cost | The financial considerations related to registering for, and travelling to, a program. |
| 9 | Program | The choice of a program based on the subject or combination of subjects, offered and the anticipated learning experience. |
| 10 | Personal Limitation | The need to factor in a personal limitation when selecting a program (e.g. difficulty walking). |
| 11 | Escape | Selecting a program that will satisfy a personal need to get away or take a break. |
| 12 | Travel | Selecting a program based on the desire to combine it with another travel experience such as a family visit or vacation. |
| 13 | Organizational Attributes | The influence and reputation of the program, instructors, sites, and co-ordinators on program choice. |
| 14 | Accessibility | Decisions related to the travel distance, method of transport, and ease of access to reaching the host destination, the program site. |
| 15 | Previous Experience | The influence of past experience with the organization on present program choice. |
| 16 | Dates | The best or only time available to enrol in a program. |

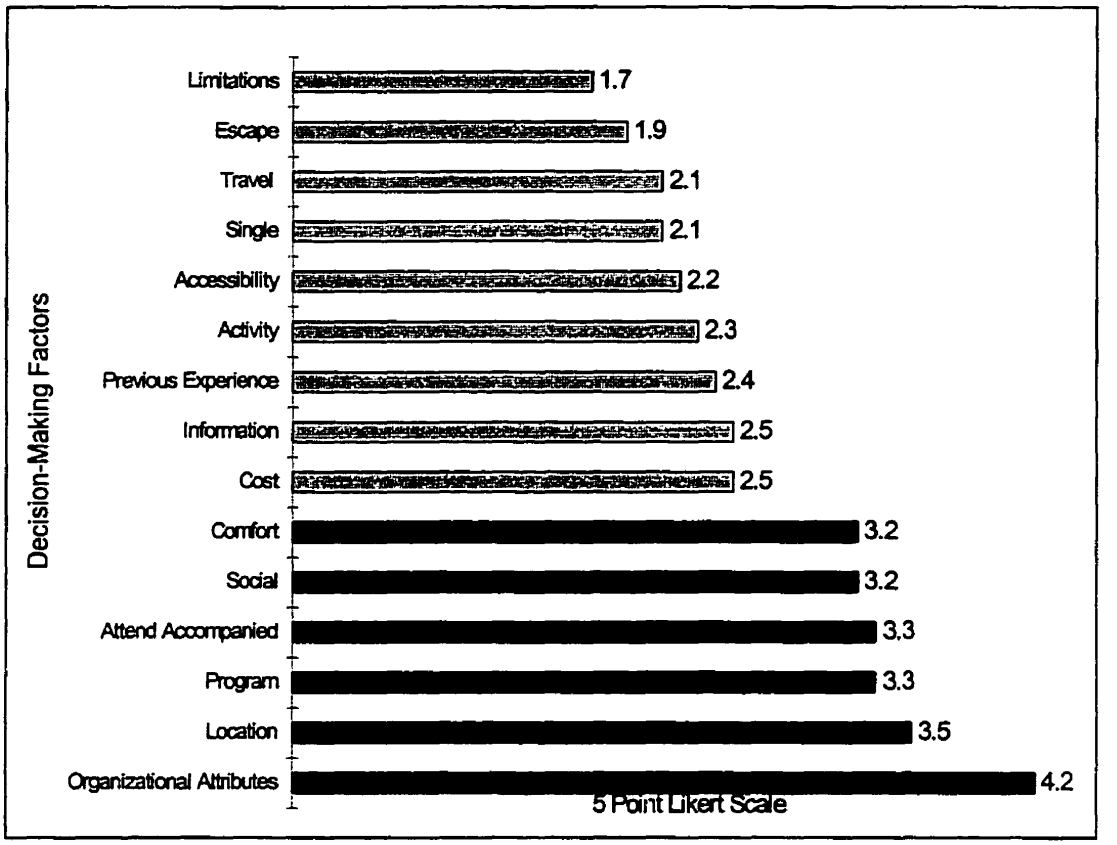
| # | Factor | Defined as: |
|---|---|---|
| 17 | Seasonal Influence | The impact of predictable seasonal activities (e.g. weather, travel conditions, holidays, seasonally specific programs) on program choice. |
| 18 | Work | The influences of employment on the decision to enrol. |

## 4.5.20 Which factors are most important?

To answer research question 2.1: **Which of the decision-making factors are most important to decision-making?**, the 15 factors derived from the factor analysis were rank analyzed by ranking them according to their means (Figure 37) . The three factors that were derived from the content analysis of the open ended questions were not included in this section of the analysis because they had not been quantified.

The most striking feature of this illustration is how the organizational attributes factor stands out from the fourteen others with a mean score of 4.2. Just above it are five factors (Location, Program, Attend Accompanied, Social and Comfort) whose mean scores are very close together (3.5 to 3.2). Beyond these six factors, there is a drop starting with the cost factor ($\bar{x} = 2.5$) and gradually decreasing to the Personal Limitation factor ($\bar{x}$ 1.7). One cannot help but wonder if there is any significance to the two 'steps' witnessed in Figure 37. It is important to be reminded at this time, that in order for the factor analyses to be performed using SYSTAT, all the not-applicable responses were coded as #1 on the five point Likert scale and therefore, to some degree these mean scores are somewhat lower than they would otherwise be.

**Figure 37 Analysis of the Mean Scores of the Factors Influencing Program Choice**




A series of chi-square tests between the 15 factors influencing program choice and the demographic characteristics revealed several statistically significant relationships, at a probability level of $\leq 0.05$. A summary of the findings is presented here:

1. The **single** factor was less important to men (85%) than women (76%) and it was important to 7% of the Americans versus 17% of the Canadian participants;
2. The **social** factor has a stronger influence on program choice for people planning to attend alone (41%) than those planning to attend with a companion (20%);
3. The **comfort** factor has a stronger influence on program choice for people planning to attend with a companion (41%) than those attending alone (22%);
4. The **program** factor had less influence on people attending with a companion (48%) compared to those who planned to attend alone (22%);

5. The **accessibility** factor was less important to people planning to attend alone (52%) than those attending with a companion (32%) and more important to Canadians (22%) than Americans (7%). Overall this factor was only important to 6% of the single travellers, 11% of those with a companion;

6. The **previous experience** factor with Elderhostel Canada only influenced 18% of single participants and 5% of people attending with a companion. The majority (67% singles, 78% with a companion) indicated this factor had little influence on program choice;

7. **Previous experience** factor had little influence overall, but of the people who rated it as an important influence, 17% were Canadian, 6% American;

8. The **accompany** factor had a slightly stronger influence on men (47%) than women (40%);

9. **Organizational attributes** strongly influenced the program choice of both genders, however it was stronger for women (83%) than men (75%);

10. Americans (49%) reported **location** having a stronger influence on program choice than Canadians (23%);

11. **Cost** has a greater influence on program choice with Canadians than Americans, as presented in the earlier presentation of this factor; and

12. The **escape** factor was not a strong influence on the majority of participants, however for those who indicated it influenced program choice, 14% were Canadian, 9% American.

Three predictable associations between: (1) the escort variable and the single factor, (2) the escort variable and the Accompany factor, and (3) the enrolment variable and the previous experience factor existed but they are only of statistically significant. When one explores the liaisons they are of no practical significance. For example, when the escort variable is crossed with the single factor one discovers that the 'single factor' influences program choice for people who plan to attend alone.

## 4.6 An Analysis of the Factors Influencing Program Choice

The purpose of this final section is to examine the relationships between the factors influencing program choice, the five participant types, and people with different demographic characteristics in order to answer the final research question: **How do participants of different types and demographic characteristics vary in the importance placed on the factors influencing program choice?**

To determine the percent of explained variance, the best predicting factors, and the patterns of interactions between variables, the General Linear Model (GLM) and step-wise regression were used. The GLM was selected as the primary form of analysis because it calculates a full range of statistical tests (means, ANOVA, regression, canonical correlations) on individual dependent variables with multiple independent variables; a particularly useful way to explore the various relationships in the data base when doing exploratory research. Step-wise regression was also used as an alternate way of examining the data. This final section of the analysis reports the findings from these analyses.

### 4.6.1 The Strength of the Relationships

Sixty seven percent of the explained variance could be accounted for by the fifteen factors identified in the factor analysis, the five participant types and the four demographic variables (square of the canonical correlation = 0.82) using the GLM. A review of the multiple correlations resulting from the regression analysis revealed that the 15 decision-making factors were able to predict 45% of the variance associated with the Activity-Oriented, 29% of the variance with the Explorer, and 19% with the Content-Committed. The 15 choice factors were less helpful in predicting the Convenience-Oriented and Opportunist, accounting for 13% and 7% of the explained variance respectively (Figure 38 and Table 45).

The ability of the 15 decision-making factors to predict the four demographic variables (Figure 39), revealed that they were most useful in predicting the nationality and escort variables. The reader will note that the 64% explained variance with the escort variable is strikingly close to the 67% explained variance for the entire population. At first glance this may appear to be an error. However, the 67% is based on a canonical correlation, a form of regression analysis that uses two or more dependent variables with two or more independent variables (in

this case 9 dependent and 15 independent variables); whereas, the 64% variance figure is derived from a multiple regression analysis that uses two or more independent variables (15 in this case) to predict one dependent variable (escort). In addition, the demographic characteristics (for example female = 1; male = 2) were treated as continuous variables when in fact they are not, thus breaching the rules of multivariate analysis. The decision to do this, however, was based on the importance of these variables and the need to understand them in exploratory research. However, the reader is cautioned about over-generalizing the findings related to the demographic characteristics.

**Figure 38 Amount of Explained Variance with the Five Participant Types**

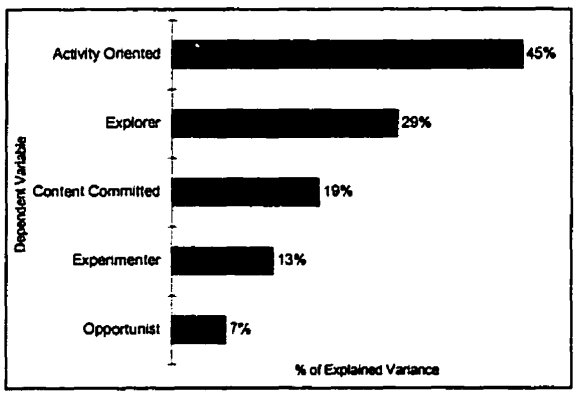



**Figure 39 Amount of Explained Variance by Select Demographic Characteristic**

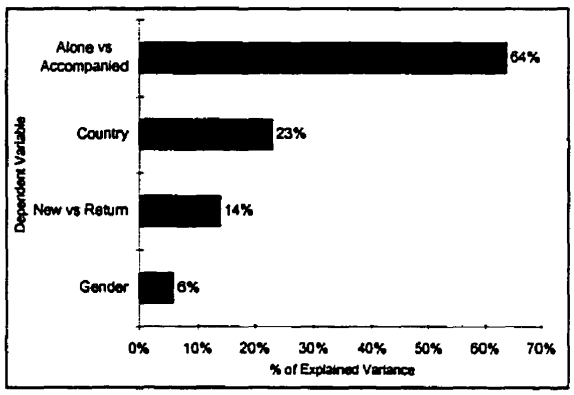



**Table 45 Regression Analysis Multiple Correlations**

| Typology | Multiple Correlation (R) | Explained Variance[a] |
|---|---|---|
| Explorer | 0.55 | 29% |
| Activity-Oriented | 0.68 | 45% |
| Content-Committed | 0.46 | 19% |
| Convenience-Oriented | 0.38 | 13% |
| Opportunist | 0.31 | 7% |
| Gender | 0.29 | 6% |
| Country | 0.50 | 23% |
| Enrolment | 0.40 | 14% |
| Escort | 0.80 | 64% |

[a] Adjusted $R^2 = 1 - (1 - R^2) \times (n - 1) / df$, where $n = 643$ and $df = 627$

### 4.6.2 The Best Predicting Factors

Multiple regression analysis and step-wise regression analysis were used to examine the data and determine which of the 15 program choice factors could be used to best predict if a person was an Explorer, Activity-Oriented, Content-Committed, Convenience-Oriented or Opportunist. As there was little difference between the regression results and the step-wise regression results (Appendix R), the researcher elected to report the later.

Table 48 presents a matrix of the step-wise regression coefficients emerged. Note that in most cases, the regression 0.08 was the level at which the ANOVAs confirmed statistically significant relationships and larger step-wise regression F-scores, were found ( >24.00). In terms of reporting the most salient predictors for each of the five participant types, on four demographic variables, the relationships associated at the 0.08 level were cross-validated using other statistical steps (e.g. ANOVA).

The strongest predictor identified in the step-wise regression analysis for the **Explorer** was the Location factor (R = 0.34). The second strongest predictor was the Activity factor (R = 0.19) followed by the Comfort (R = -0.17) and Accessibility factors (R = -0.16). The strength of the regression coefficient for the Activity factor (R = 0.74) in predicting the **Activity-Oriented** participant type was the strongest overall of all the factors in all calculations (Table 48). The second strongest factor was Personal Limitation (R = -0.23). This finding synthesizes with the qualitative discovery reported in the earlier discussion of the Activity factor that noted that while physical and outdoor activity have a strong influence on one type of person program choice, it is exactly these factors that push away others. It is interesting to the researcher that these to factors were the strongest in this analysis.

The Program factor was the strongest predictor for the **Content-Committed** (R = 0.64). followed by Organizational Attributes (R = -0.17) and Single (R = 0.15) factors. The Program factor also was the strongest predictor for the **Opportunist**, albeit quite weaker (R = - 0.19) than the Content-Committed. Finally, the most discriminating factors for the **Convenience-Oriented** were Accessibility (R = 0.18) and Location (R = 0.16), a finding that triangulates with Arsenault (1996) and the written comments provided by participants in the questionnaire. It is important to note that nine of the fifteen factors emerged from the analysis with the Convenience-Oriented which indicates to the researcher that this participant type requires further definition and

investigation, particularly in lieu of the fact that this was the participant type that was relabelled based on the analyses reported earlier.

In terms of demographic variables, the program choice factors were the weakest in predicting **gender**. The strongest factors were Previous Experience (R = 0.07), Single (R = -0.06) and Activity (R = 0.06). Remember that gender only accounted for 6% of the explained variance which leads one to conclude that perhaps gender may not be an important variable for older adult in educational-travel programs. In fact, (Muller, 1994) who studied the travel experience of older Americans, acknowledges that while gender is important, it was less significant than expected. He went to say that, as one ages, gender distinctions diminish. It is impossible to say whether this is true or not, and considering that women out-numbered men in this sample 1.9: 1, it would be premature to dismiss gender as an unimportant variable with older adult educational-travellers. Rather, future researchers may ask whether the research approaches been appropriate for teasing out the important issues related to gender.

The Location (R = 0.16) and Previous Experience (R = -0.15) variables were the most useful predictors for the **nationality** variable, a finding that triangulates with the statistically significant chi-square findings reported earlier. The **enrolment** variable (new versus return participants) had two notable predictor variables, Previous Experience (R = 0.15) and Information (R = -0.09). When one considers that 80% of the study population represents return participants, and by virtue of their continued enrolment they receive regular program information from Elderhostel, these associations come as no surprise the researcher. Rather they are testimony to the importance of previous participation and the use of the catalogues as a primary source of information. Finally, the Single and Accompanied factors were best able to predict the **escort** variable which may statistically notable, but of no practical significance for they represent logical links to the person who plans to attend alone versus the person who plans to attend accompanied. Table 46 summarizes the major findings from the multivariate analysis.

**Table 46 A Summary of the Multivariate Analysis**

| Participant Type and Demographic Characteristic | Two Best Predictors | Other Predictors where R≥.10 in the Step-Wise Regression Analysis | Explained Variance[a] |
|---|---|---|---|
| Explorer | Location, Activity | Comfort, Accessibility | 45% |
| Activity-Oriented | Activity, Limitations | Location, Program | 29% |
| Content-Committed | Program Organizational-Attributes | Single | 19% |
| Convenience-Oriented | Accessibility, Location | Limitations, Organizational Attributes | 13% |
| Opportunist | Program, Cost | Escape, Limitations | 7% |
| Gender | -- | -- | 6% |
| Nationality | Location, Previous Experience | -- | 23% |
| Enrolment | Previous Experience | -- | 14% |
| Escort | Accompany | -- | 64% |

Note: Only factors with a step-wise regression coefficient ≥0.10 are in this summary

[a] Adjusted $R^2 = 1 - (1 - R^2) \times (n - 1) / df$, where n = 643 and df = 627

## 4.6.3 Interaction Patterns Between Variables

The cross option of the GLM was used to explore the patterns of interaction between the typology and factors influencing program choice when crossed first by gender, then nation, then both. Several statistically significant findings were revealed when the factors influencing program choice was crossed by gender then nationality, but only three relationships emerged when crossed by both.

Similar to the step-wise regression results reported earlier for the **Explorer**, the relationships between the Comfort, Location, Activity, Accessibility and Accompanied variables emerged when crossed by gender (Table 49). No statistically significant relationships were found between gender and the social, information, travel, and previous experience variables. The association with the Activity factor remained strong with the **Activity-Oriented** when crossed by gender, the connection to the Personal Limitation factor resurfaced, the Program factor remained the same as in the earlier calculation (R = 0.10). For the **Content-Committed** the same factors were reported in this calculation as the step-wise regression analysis, with the only notable difference being that the size of the regression coefficient, when cross with gender, was reduced

from R = 0.064 to R = 0. 38. When the **Convenience-Oriented** was crossed with gender only two factors emerged, Accessibility and Location. Finally, consistent to the finding reported earlier the **Opportunist** when crossed by gender was best predicted by the Program factor.

When the factors influencing program choice were crossed with the country variable, no statistically significant relationships emerged with the Opportunist, one with the Content-Committed, two with the Activity-Oriented, and four with the Explorer (Table 50). What is interesting, when one compares Table 50 with Table 49 is that four factors are repeated (Location, Single, Organizational Attributes, Accessibility) but two new ones emerge (Travel, Previous Experience).

The final GLM cross was between country, gender and the factors influencing program choice. Here there were no statistically significant relationships with the Explorer, Content-Committed or the Opportunist (Table 47). The Activity Oriented reported two relationships with the Activity and Program factors, while there was a significant relationship found with the Activity Oriented and the Activity factor.

**Table 47 Country x Gender x Factor Regression Coefficients**

| Variables | *p*= | Explorer | Activity-Oriented | Content-Committed | Convenience-Oriented | Opportunist |
|---|---|---|---|---|---|---|
| Country x Gender x Activity | 0.01 | -- | 0.10 | -- | -0.07 | -- |
| Country x Gender x Program | 0.02 | -- | -0.10 | -- | -- | -- |

**Table 48 Step-Wise Regression Coefficients Associated with the Factors Influencing Program Choice, Participant Types & Select Demographics**

| | Explorer | Activity-Oriented | Content-Committed | Convenience-Oriented | Opportunist | Gender | Nationality | Enrolment | Escort |
|---|---|---|---|---|---|---|---|---|---|
| Social | 0.09 | -- | -- | 0.08 | -0.09 | -- | -- | -- | -0.06 |
| Comfort | -0.17 | -- | -- | -- | -- | 0.03 | 0.05 | 0.04 | 0.02 |
| Location | 0.34 | 0.12 | -0.08 | -0.16 | -- | -- | 0.16 | -0.02 | -- |
| Single | -- | -- | 0.15 | -- | -- | -0.06 | -0.05 | -- | -0.09 |
| Accompany | -0.05 | -- | -- | -- | -- | 0.04 | -0.02 | -- | 0.18 |
| Activity | 0.19 | 0.74 | -- | -- | 0.08 | 0.06 | 0.05 | -- | -- |
| Information | 0.06 | | -- | 0.08 | -- | -- | 0.05 | -0.09 | -- |
| Cost | -- | -- | -- | -- | 0.13 | -- | -- | -0.05 | -- |
| Program | -- | -0.10 | 0.64 | -0.08 | -0.19 | -- | -- | -- | -- |
| Limits | -- | -0.23 | -- | 0.10 | 0.12 | -- | -0.04 | -- | -- |
| Escape | -- | -0.05 | -- | 0.06 | 0.10 | -- | -- | -- | -- |
| Travel | -- | -0.08 | -- | -0.08 | -- | -- | -0.04 | -- | 0.02 |
| Organizational Attributes | -- | -- | -0.17 | -0.10 | -- | -- | -- | 0.04 | -0.03 |
| Accessibility | -0.16 | -- | - | 0.18 | -- | -- | -0.05 | -- | -- |
| Previous Experience | -- | -- | -- | -- | -- | -0.07 | -0.15 | 0.15 | -- |

Note: p = ≤ 0.05 and the two factors with the highest coefficient in each column have been highlighted to enhance comparison

**Table 49 Gender x Factor Regression Coefficients**

| Variables | *p*= | Explorer | Activity-Oriented | Content-Committed | Convenience-Oriented | Opportunist |
|---|---|---|---|---|---|---|
| Gender x Comfort | 0.00 | -0.11 | -- | -- | -- | -- |
| Gender x Location | 0.00 | 0.22 | -- | -0.09 | -0.10 | -- |
| Gender x Single | 0.05 | -- | -- | 0.08 | -- | -- |
| Gender x Accompany | 0.02 | -0.05 | -- | -0.05 | -- | -- |
| Gender x Activity | 0.00 | 0.08 | 0.46 | -- | -- | 0.06 |
| Gender x Cost | 0.05 | -- | -- | -- | -- | 0.09 |
| Gender x Program | 0.00 | -- | -0.10 | 0.38 | -- | -0.13 |
| Gender x Limitations | 0.00 | -- | -0.17 | -- | -- | 0.08 |
| Gender x Escape | 0.03 | -- | -- | -- | -- | 0.08 |
| Gender x Organizational Attributes | 0.00 | -- | -- | -0.17 | -- | -- |
| Gender x Accessibility | 0.00 | -0.11 | -- | -- | 0.12 | -- |

**Table 50 Country x Factor Regression Coefficients**

| Variables | *p*= | Explorer | Activity-Oriented | Content-Committed | Convenience-Oriented | Opportunist |
|---|---|---|---|---|---|---|
| Country x Location | 0.03 | -- | -- | -- | 0.12 | -- |
| Country x Single | 0.00 | -0.14 | -- | -- | -- | -- |
| Country x Travel | 0.00 | 0.10 | -- | -- | -0.12 | -- |
| Country x Organizational Attributes | 0.00 | -0.10 | -0.21 | -- | -- | -- |
| Country x Accessibility | 0.02 | -- | -- | -- | 0.09 | -- |
| Country x Previous Experience | 0.03 | -- | 0.11 | 0.12 | -- | -- |

## 4.7 Summary of the Analysis

This chapter presented the analysis of data collected from 811 Elderhostel participants enrolled in a Fall 1997 Elderhostel Canada program. The purpose of the study was to determine the factors influencing the choice of an educational-travel program, ascertain if a participant typology existed, and explore the interaction between the program choice factors, participant types, and four demographic characteristics. A full range of analytical procedures were used to interpret the data including descriptive statistics, chi-squares, correlations, regression, step-wise regression, analysis of variance, factor analysis, and content analysis.

Eighteen factors influencing program choice were reported. The fifteen latent constructs that emerged from the 52 item factor analysis were: social, comfort, location, attending alone, attending accompanied, activity, information, cost, program, personal limitations, escape, travel, organizational attributes, accessibility and previous experience. Three additional factors emerged from the content analysis of 1,971 written comments: dates, seasonal influence and work.

The typology factor analysis reduced Arsenault's (1996) six-type participant typology to five. The Content-Committed, Activity-Oriented, and Opportunist remained intact while the former Experimenter was names the Convenience-Oriented based on new evidence that shifted the emphasis from this type describing a new participant to a type of participant who selects programs near to their home. The fifth type, the Explorer, was created by uniting two former types (the Adventurer and Geographical Guru); it was also the dominant participant type in terms of explained variance. In terms of actual number of participants who were identified as pure types, the dominant type was the Activity-Oriented. This study found that by using three participant types (pure and blended), the Explorer, Activity-Oriented, and Content-Committed could account for 77% of the Elderhostelers in this study.

To conclude this chapter, each research question, with a succinct response, is provided in Table 51.

**Table 51 A Summary of the Research Questions**

| | Research Questions | Response |
|---|---|---|
| 1. | Do the typologies reported in previous research adequately describe the older adult educational-travel participant? | There is some similarity between Houle's (1961) Goal Oriented learner and Cohen's (1972's) Explorer. |
| 1.1 | Do participants tend to represent pure or blended types? | 63% of the participants could be assigned to one of the five pure categories, 22% represented blended types, and 15% did not fit the typology |
| 1.2 | Which participant types are dominant? | 32% of the study population could be identified as Activity-Oriented, 21% as Explorers |
| 2. | What are the critical factors influencing older adults in their choice of an educational-travel program? | Social, comfort, location, attend alone, attend accompanied, information, cost, program, personal limitation, escape, travel, organizational attributes, accessibility, previous experience, dates, seasonal influences, work |
| 2.1 | Which of the factors influencing program choice are most important to the total study population? | Organizational attributes, location, program, attend accompanied, social and comfort |
| 3. | Which factors influencing program choice are most important to different types of participants? | -- |
| 3.1 | How strong is the relationship between the program choice factors and each participant type? | The amount of explained variance was:<br>Activity-Oriented: 45%<br>Explorer: 29%<br>Content Committed: 19%<br>Convenience-Oriented: 13%<br>Opportunist: 7% |
| 3.2 | How strong is the relationship between the program choice factors and each demographic variable: gender, country, enrolment and attendance? | The amount of explained variance was:<br>Escort: 64%<br>Country: 23%<br>Enrolment: 14%<br>Gender: 6% |

| | Research Questions | Response |
|---|---|---|
| 3.3 | Which factors influencing program choice best discriminate each participant type? | Explorer: Location, Activity<br>Activity-Oriented: Activity, Personal Limitations<br>Content-Committed: Program, Organizational attributes<br>Convenience Oriented: Accessibility, Location<br>Opportunist: Program, Cost |
| 3.4 | What are the patterns of interaction between the types of participants, the factors influencing program choice, gender and country? | Gender x Factors in a Regression Equation, Predictors are (R ≥0.10):<br>Explorer: Location, Comfort, Accessibility<br>Activity-Oriented: Activity, Personal Limitations<br>Content-Committed: Program, Organizational Attributes<br>Convenience-Oriented: Accessibility, Location<br>Opportunist: Program<br><br>Country x Factors in a Regression Equation, Predictors are (R ≥0.10):<br>Explorer: Single, Travel, Organizational Attributes<br>Activity Oriented: Organizational Attributes, Previous Experience<br>Content Committed: Previous Experience<br>Convenience-Oriented: Location, Travel<br>Opportunist: none<br><br>Gender x Country x Factors in a Regression Equation, Predictors are (R ≥0.10):<br>Activity Oriented: Activity, Program<br>Convenience-Oriented: Activity<br>Explorer, Content-Committed, Opportunist: none |

# CHAPTER V: A DISCUSSION OF THE FINDINGS

## 5.1 Introduction

As the international community prepares to welcome in the 21st century, many businesses, researchers, governments, and service industries are looking ahead, planning for the future. The past decade has been difficult for educational organizations and institutions that, like many others, have experienced a changing environment coupled with reduced resources. Financial losses associated with programs that fail can no longer be absorbed by institutions and organizations (Queeney, 1995).

The sustainability of any educational program is contingent on participation and understanding the participant is important to people whom plan, administer, and teach educational programs. Decades of research have brought increased understanding about why people do and do not participate in adult education programs. Relatively little research however, has looked at the educational participant as a consumer; a person who has the task of choosing both a venue for learning and specific program, or group of courses, that meet their learning needs. The choice of formal and non-formal adult education courses has never been greater. As universities, colleges, and other educational institutions look at restructuring their departments, the time has come to begin to understand the differences between the factors that motivate a person to learn and the factors that influence educational choices.

The diversity in education programs available to adult learners has increased this century, along with the age range of adult participants. Increased longevity means that people are living longer healthier lives and they have more time in retirement to engage in activities that are personally satisfying and increase their quality of life. This new population of elders represents challenges and opportunities for academic, not-for-profit, private, and governmental organizations who wish to develop innovative and responsive programs that meet the needs of today's older adults. One retirement activity that has been increasing in popularity with older adults is educational-travel.

Throughout this century, the number of organizations, institutions, agencies and businesses that offer formalized opportunities to learn and travel has expanded tremendously. Since the 1970's, Institutes for Learning in Retirement, the University of the Third Age, and

New Horizons have developed community based learning programs for older adults and Elderhostel has provided educational programs for the retired educational-traveller. Despite the fact that research aimed specifically at the senior learner and senior traveller remains limited (Thornton, 1992; van Harssel, 1994), these pioneer organizations have forged ahead, reached out to older adults, and become model organizations who understand and program for niche older adult markets.

Morrison (1994) described travel and education as complementary activities. He wrote that the success of Elderhostel has demonstrated the potential for educational-travel as a viable retirement activity for older adults. Already, the tourism industry is targeting retirees because they have the time to travel and many are willing to spend their money on this type of activity (van Harssel, 1994). As well, if one believes leading adult educators, who claim that the more education a person has, the more they want (Cross, 1992; Merriam & Caffarella, 1991), then the future of educational-travel programs for older adults has great potential. The demographic profile of upcoming cohorts of older adults suggests that the intellectual stimulation, social pleasure, adventure, and excitement that can be found in an educational-travel program will attract many future retirees. Community based learning will provide an alternative or complementary option.

The success of educational tourism for older adults will depend on how well organizations, institutions, and companies understand the diverse needs of this population (van Harssel, 1994). "One of the reasons Elderhostel has survived is because it is ever-experimenting, ever-changing, and an energetic organization" (Mills, 1993, p. 181). It has also benefited from a continuous flow of research findings from the academic community that has used Elderhostelers as a study population in a wide range of studies (Arsenault, 1996; O'Connor, 1987; Ostiguy et al., 1994; Quintern-Reed, 1992; Rice, 1986; Romaniuk & Romaniuk, 1982; Wirtz & Charner, 1989). This study, which examined the social context for educational-travel, participant types, and the factors influencing program choice, is a case in point.

## 5.2 A Discussion of the Major Findings

There were three main objectives in this study. The first was to determine which factors influence older adults when selecting an educational-travel program. The second objective was to determine if the types of participants described in previous research adequately described the

older adult educational-travel participant. Finally, this study quantitatively explored the interaction between the each participant type to determine which factors had the greatest impact on program choice.

### 5.2.1 Factors Influencing Program Choice

This study identified 18 factors influencing program choice: social, comfort, location, attend alone, attend accompanied, activity, information, cost, program, personal limitation, escape, travel, organizational attributes, accessibility, previous experience, dates, seasonal influence and work. The first fifteen were derived from a quantitative factor analysis, the last three from a qualitative content analysis. Many of these factors are reported in the adult education, educational gerontology, and pleasure travel literature albeit with greater presence in one literature body over another.

The social factor accounted for the largest percent of explained variance and included such elements as: (1) learning with people my own age, (2) being part of a group, (3) meeting new people, and (4) being with people who share my learning interest. The individual items that were factored together are found in a variety of prior adult education and pleasure travel studies, be they qualitative or quantitative. (Arsenault, 1996; Boshier, 1971, 1991; Carp et al., 1974; Cohen, 1972; Crompton, 1979; Cross, 1992; Henry & Basile, 1994; Houle, 1961; Merriam & Caffarella, 1991; Morstain & Smart, 1974; Quintern-Reed, 1992; Rice, 1986; Romaniuk & Romaniuk, 1982; Wirtz & Charner, 1989). This study affirms the importance of the social factor with older adult learners when selecting an educational-travel program.

The comfort factor accounted for the second largest amount of explained variance. The importance of private bath/shower facilities and a private toilet was consistent in both the pilot study and the actual study. Hitchcock (1994), in her study of the travel preferences of older Canadians, found that retirees do not want to pay a lot of money, rather they would like comfortable accommodations at a reasonable price. The comfort factor also included feeling safe, a well-known attribute associated with Elderhostel programs (Arsenault, 1996).

It is this researcher's position that, accommodating the creature comfort and security needs is paramount to any educational or travel institution that wishes to attract and retain older adults. This point was crystallised in an interview with Francine, an 80 year old former schoolteacher, who had attended so many Elderhostels she had lost count (Arsenault, 1996). It

was heart-wrenching hearing her describe, with tears in her eyes, why the program she was attending would be her last. The program she had selected was held on a university campus, and like most campuses, the dormitories, the dining hall, and the classrooms were quite far apart, a detail not made explicit in the program catalogue. Although Francine was able to walk the distances, the speed at which she could travel made it awkward for her to arrive on time. Rather than enter class late, which she described as insulting to the educator, she chose not to attend many of the classes and she did not join the group for the field trip.

While no study could be found that specifically addressed the personal comfort requirements of older adult learners, this study raises the issue. Programmers and administrators involved in providing programs targeted to retired people would be wise to understand the physical effects of ageing, which are well documented in the gerontology literature. While the speed at which each person ages differs physically, psychologically, socially, and emotionally (Moschis, 1992), eventually one or more of these factors will become important to the older adult enrolling in an educational program. If society is to respond to the learning needs of older adults, and expand the existing programs to include a wider range of retirees, it will be important for program developers and administrators to remain cognisant of the comfort factor.

The decision to attend alone versus attend with a companion is a significant factor that impacts the educational choice process. This study revealed that 79% of the participants planned to attend with at least one companion, usually a spouse. Of these participants, 83 to 94% of the decisions concerning the geographic location, type of program, method of travel, travel distance, accommodations, dates and final program choice were made jointly. Knowing that the majority of older adults prefer to travel with a companion (van Harssel, 1994), future educational-travel and older adult learner studies should focus on understanding the influence of joint decision-making.

The activity factor revealed that a percentage of the study population, when selecting a program, are influenced by the amount of physical activity involved and how much of the learning will take place outdoors. To a large number of participants, being outdoors and physically active is attractive, however to others (particularly those who do not enjoy winter) these attributes are represent a deterrent and programs with these elements are dropped from the consideration set of options.

One particularly interesting finding that emerged was that the majority of the participants indicated that their program choice was more strongly influenced by the catalogue information than by word of mouth recommendations. This quantitative finding from the questionnaire data is contrary to the qualitative findings reported by Arsenault (1996) and Mallory and McCauley (1998). In Arsenault's (1996) study, participants reported the influence of family and friends on program choice as one of the primary sources of information when selecting a program; a finding similar to Mallory and McCauley. In the Mallory and McCauley study with Elderhostel participants in the USA, they reported that participants mentioned the catalogue less often and indicated that their program choice was heavily influenced by others. As both print and personal sources of information can impact the decision-making process, rather than spend time determining which information source has a greatest influence, a future study may be more valuable if it could tease out how each information source differs as it pertains to selecting an educational program.

A small percentage of the participants indicated their program choice was influenced by the need to accommodate a sensory limitation (6%) or a physical limitation (14%). In addition, 10% reported that their choice of an educational-travel program was influenced by the need to find a program with minimal physical activity. Although these participants are fewer in number, it signals the importance of understanding and accommodating the declines in physical abilities that come with ageing. In an earlier study, Ostiguy, MacNeil and Hopp (1994) reported an inverse relationship between participation and visual problems; the more a participant was concerned about her or his vision, the less likely it would be that he or she would participate. Knowing this, one cannot help but wonder if new educational-travel programs were designed to cater specifically to declines in hearing, sight, and walking ability, whether the diversity of the participant base would increase.

The need to distance oneself from a particular situation, physically or psychologically, relates to the escape factor, a factor which has been reported in the literature for almost three decades (Arsenault, 1996; Boshier, 1971,1991; Crompton, 1979; Cross, 1981, 1992; Etzel & Woodside, 1982; Muller, 1994; Rice, 1986). The presence of this factor in this study came as no surprise because, if people use education programs or pleasure travel to get away from home responsibilities or forget personal worries, it follows that enrolling in an educational-travel program would provide similar benefits.

The travel factor accounted for only a small percent of the explained variance, which is interesting when one considers that 30% to 50% of all pleasure-travel trips involve multi-destinations (Lue et al., 1993). The researcher recalls from the previous study, that many participants described selecting a program because it tied in with some other reason such as a family visit, a reunion, or a desire to tour the area. In this study only a small number of hostelers reported being influenced by a desire to enrol in two or more consecutive programs. This finding may be unique to this sample, or it may be related to the fact there were so few Likert items related to this factor. Future quantitative studies will want to ensure this factor is made more robust by adding items related to the travel factor to the instrument.

In reviewing the final list of factors influencing program choice, it is interesting to note that six factors (cost, work, accessibility, dates, information, organizational attributes) exist in the adult education participation literature but, more often than not, they are associated with the research that identifies barriers or deterrents to participation (Carp et al., 1974; Cross, 1981, 1992; Merriam & Caffarella, 1991; Ostiguy et al., 1994; Scanlan & Darkenwald, 1984). For example, Cross (1992) defines institutional barriers as "scheduling problems; problems with location or transportation; lack of courses that are interesting, practical or relevant; procedural problems and time requirements; and lack of information about programs and procedures" (p. 104). Using Cross's definition one could argue the date, location, accessibility, program, information, and organizational attributes factors could all be defined as institutional barriers.

In 1984, Scanlan wrote that, "the adult education literature has failed to provide substantiation for the inclusion of the deterrents construct in theories of participation" (p. 165). Perhaps this is with good cause, for this researcher would argue that the barriers (deterrents) to participation might be better understood from a consumer behaviour perspective. A perspective that examines the entire 'consumption' process from the motivation (desire to enrol in an educational program), through the acquisition and evaluation of information, to the post-purchase assessment – were the participants satisfied?

The responses to the open-ended questions indicated that there was a strong seasonal influence on program choice. Although it is not a factor reported in the adult education literature, the study of seasonal influences is germane to the tourism industry (Williams, Dossa, & Hunt, 1997) and thus an important consideration for understanding the choice of an educational-travel program. The study was deliberately limited to one season because of the issues being explored, and the instrument being developed, was new. Based on the findings of this study, and a revised

questionnaire, it would be ideal to examine one or more educational-travel programs over the course of a year. This would provide a greater level of understanding of the impact the seasonal factor has on program choice.

Many of these seasonal attributes function as both push and pull factors, depending on the person and the situation. Consider, for example, the climate. To some people, the 'pull' of visiting Canada's north to see the polar bears before the cold of winter sets in is enough to inspire certain participants to enrol in an educational-travel program at a specific geographical location, such as Churchill Manitoba. To the hosteler who may live in Churchill, the onset of the cold, snowy, winter weather may be a 'push' factor for an individual whose unique health condition is compounded by the winter weather therefore making life easier if one travels to a warmer climate or enrols in an educational-travel program in a warmer climate. As the population of older adults expands, and education and travel organizations find ways to attract the retired learner and traveller, understanding the impact of various seasonal influences on the older adult will be important whether one is offering a community based educational program or one with a travel component.

Finally, one of the most interesting questions asked by the site co-ordinators at various presentations during this study was: "Which is more important, the location or the program?" When rank ordering the factors, according to explained variance, the Location factor (related to the destination) was in third place, preceded by the Social and Comfort factors. The Program factor (studying a specific topic, expanding knowledge, following a program with theme) placed 9$^{th}$ after the Cost, Attend Alone, Attend Accompanied, Activity and Information factors. An analysis of the written comments helps illustrate how participants themselves weave the two factors together within one comment. Consider the following two quotations.

> **Participant A:** I go for the program content first. If there is a place I've never been, that I would like to visit, I would choose that. But first I look over the programs offered, regardless of location.
>
> **Participant B:** Location mostly, also program, but usually we find programs of interest in virtually all locations. The program attracted us because it focused on the natural setting.

Participant A implies that program is more important **but** qualifies her statement by looking for a place she's never been. Participant B indicates location is most important **but** makes a comment related to the program. Table 52 illustrates the inter-relatedness between the written comments provided by participants related to the program and location factors.

There is no question that educational-travel programs are a multi-attribute consumer option that combines the attractions and benefits of learning and travel into a unique opportunity. Whether the program or location is more important, probably depends on the individual, the situation, and a variety of other factors such as cost, the desire to combine the Elderhostel experience with other travel plans, the influence of one's travel companion, and the list could go on. It may also relate to the issue of venue over program. One hypothesis the researcher has developed is that, while learning is important, by virtue of taking the decision to enrol in an educational-travel program with Elderhostel (a reputable program provider), the participant can be somewhat assured they will have a quality learning experience. The focus of the actual program choice can then turn to more pragmatic issues such as location, cost, and comfort.

**Table 52 Program - Location Factors**

| Program – Location | Location - Program |
|---|---|
| I try to pick an Elderhostel that first informs/teaches me something new. Then I generally like to experience a new area of the continent. | The location was interesting and we had never been to that part of Canada. The subjects are a challenge (painting and print-making) and the exploring will be great. |
| Program content and a long-time interest in visiting Churchill in bear season. | Unique location, like to explore out of the way places. Study of nature and opportunity to learn about he polar bears, animals I know little about. Also to see the Aurora Borealis. |
| I was interested in the subject (photography). The location – French Riviera on the North Shore of PEI is a very pleasant area. I have relatives on PEI. | An area I have always wanted to visit, the programs are inviting. |
| First: birding, second: area we haven't visited before. | Wanted to visit the Canadian Rockies and like the program about wild animals. |

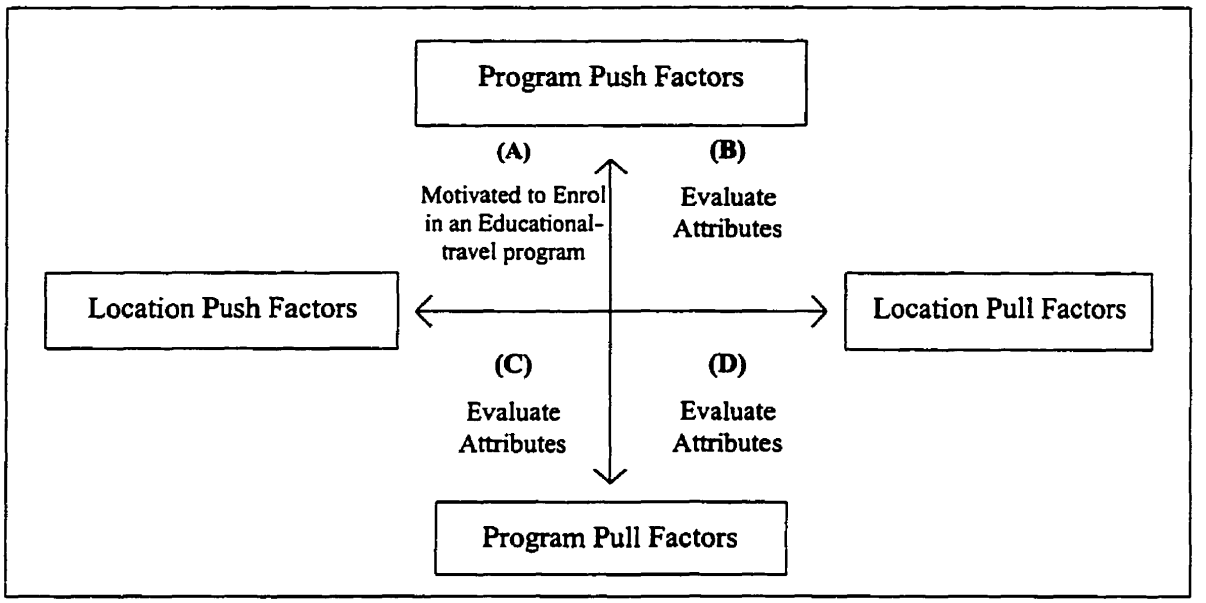
An alternate hypothesis the researcher has developed, as a result of struggling with the location versus program dilemma, is illustrated in Figure 40.

The model begins in Section (A) with the participant who is motivated to enrol in an educational-travel program. Depending on the type of person (e.g. Content-Committed) their motivation to enrol in a program may be related to a desire to study a particular topic or, if the person is an Explorer, they have a desire to learn about a particular culture, or geographic locale.

Once the decision to participate has been taken and the search for information is complete, participants will create a short-list (consideration set) of possible program choices. In evaluating the short-list, if the participant can find a program and location that equally fulfil their

needs (D) then the final choice is quite simple, as Janice explains, "The courses appealed to us, the location was new to us."

**Figure 40 The Push-Pull Nature of the Location and Program Factors**




If a person is primarily motivated (pushed) by a desire to study a specific topic, then the location (pull) is probably of secondary importance (B) as Donald explains, "The programs are the most important aspect and trying new locations is of interest." Conversely, if a person is primarily motivated (pushed) to enrol because of the attractiveness of location ( C), then the program's attributes (pull) are probably less important as Sharon explains: "Visiting Nova Scotia was something we wanted to do. Combining the learning experience with visiting the area allows us to enjoy both in a positive way."

The question as to whether program or location is more important may never be resolved, and perhaps one should not bother trying. As this study comes to a close, this researcher believes that it is the unique blend of these two factors that is at the heart of the educational-travel experience. In many ways they are so inextricably linked, rather than determine which is more important, it would be wiser to understand the dynamics of the push and pull factors related to the choice of an educational-travel program.

Educational-travel programs offer a potent mix of learning and travel attributes that appeal to different participants in different ways. It's an old cliché but a program cannot be all things to all people. Therefore, it is important to move beyond studying why people are moti-

vated to enrol in educational programs (push factors) and begin to investigate the attributes of the program and host institution (pull factors).

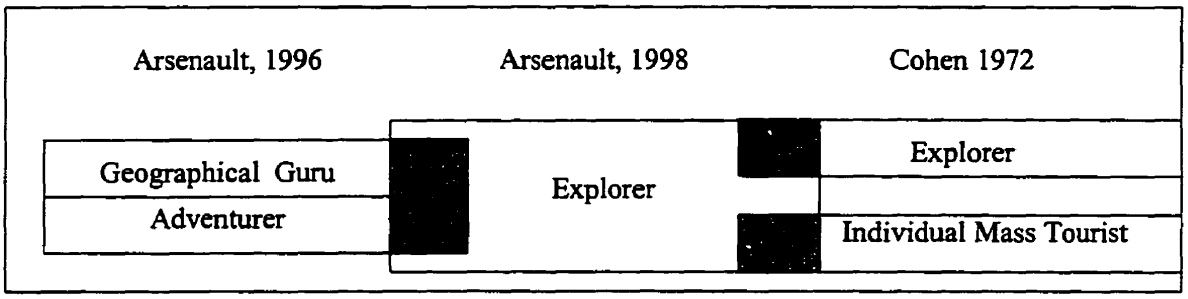
### 5.2.2 The Participant Typology

Five participant types were reported in this study: the Explorer, Activity-Oriented, Content-Committed, Convenience-Oriented, and the Opportunist. This finding was based on evidence triangulated from analyzing the questionnaire, the literature, and the findings reported in the researcher's MA study (Arsenault, 1996). Using a 5-factor solution, 92% of the variance could be explained using these five participant types.

**Explorers** are participants who look for programs, near or far, that offer the opportunity to actively seek out a new part of the world to learn about the local area, history, people or customs. Although explorers enjoy adventure and will, on occasion, be willing to sacrifice their accommodations to enjoy a unique experience, overall they prefer programs that offer basic comforts such as private bath and toilet facilities. The factors that had the strongest influence on the Explorer included the Location, Activity, Comfort, and Accessibility factors. In terms of the statistically significant demographic characteristics, the pure Explorers in this sample were primarily female, American, return participants, and people who planned to attend with a companion (each chi-square test was significant at $p < .01$ df = 1).

The pure type of Explorer accounted for 21% of the study population and 15% of the blended types. This participant type represents a synthesis of the Geographical Guru and Adventurer described by Arsenault (1996). As Figure 41 illustrates, the Explorer also shares some characteristics with two of Cohen's (1972) international tourist types. The first, the similarities with Cohen's Explorer relate to Elderhosteler who is interested in venturing off the beaten track, temporarily, but at the same times enjoys her or his creature comforts. The similarity with the Individual Mass Tourist relates to the fact that that Elderhostel provides a type of protective 'environmental bubble' in which the participant can vicariously experience a new culture, embark on a new area of study, or explore a new geographical location while enjoying a certain amount of freedom and independence.

**Figure 41 The Explorer: Arsenault 1998**




**Activity-Oriented** participants enjoy the outdoors, exploring the natural environment and being actively engaged in their learning. One defining characteristic of this participant type is the amount of physical activity they seek, or deliberately avoid. The two factors that had the strongest influence on the Activity-Oriented related to physical activity, the Activity and Personal Limitation factors. Within this sample, the Activity-Oriented were primarily females, American, return participants and people who planned to attend with a companion (each chi-square tests significant at $p < .01$, $df = 1$).

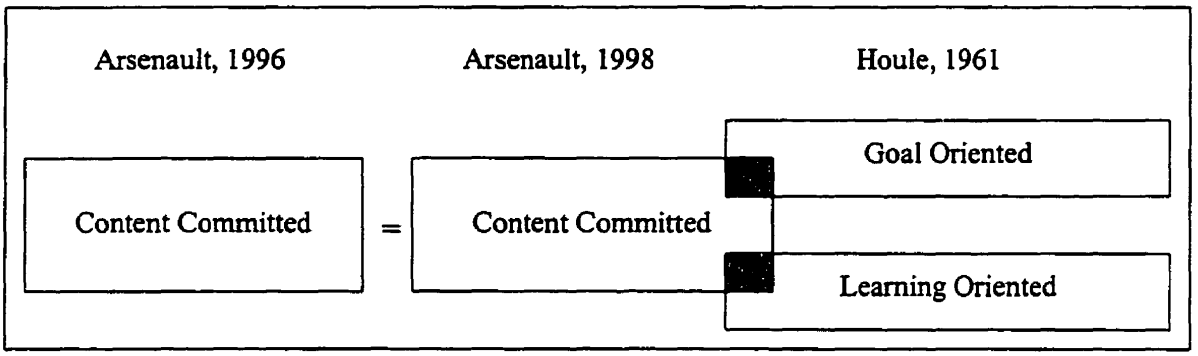
The Activity-Oriented presented here does **not** resemble any of Cohen's (1972) international tourist types, nor does it bear any resemblance to Houle's (1961) Activity-Oriented (beyond the descriptor). In Houles' typology the Activity-Oriented participates for reasons unrelated to the purpose of the course or the content, which interestingly enough is more similar to the Opportunist. Accounting for 32% pure participants, and 17% of the blended participants, Arsenault's Activity-Oriented represents a new type of participant; a participant who is attracted to the outdoor and physical activity components of an educational-travel program.

**Content-Committed** participants are passionate about studying a particular subject and look for educational-travel programs that can further their knowledge in a given area. Accounting for 7% of the pure participant types and 8% of the blended types, the program choice of the Content-Committed is based principally on the subject area or combination of courses offered. The most useful factors for predicting the Content-Committed included the Program, Organizational Attributes, and the Single factor. Participants in this category, were pre-dominately female and return participants (chi-square results for both tests were $p < .01$, $df = 1$).

The Content-Committed remains as Arsenault first described this participant in 1996. This type is not represented in the Cohen typology, but bears some resemblance to Houle's (1961) Goal Oriented and Learning-Oriented adult learner (Figure 42). The similarity with the

Goal-Oriented is that there is a clear-cut learning interest that can be satisfied through an educational-travel program. Although the learning may be non-continuous, there is a steady flow of learning activities that feed this interest. Some Content-Committed people however, may be more similar to Houle's Learning-Oriented. This subset of participants selects their educational-travel because it constitutes one types of learning activity important to the individual. Based on findings from the MA study, genealogists and photographers are examples of the Content-Committed participants.

**Figure 42 The Content-Committed: Arsenault 1998**



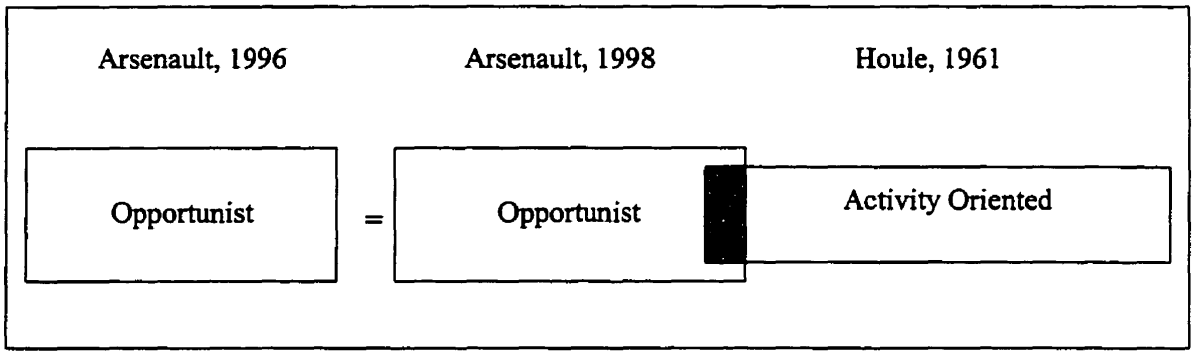

**Convenience-Oriented** participants are interested in finding an educational-travel program close to home; accessibility is the strongest predictor for this type of individual. Other factors used to predict the program choice of the Convenience-Oriented included the Location, Organizational Attributes, and Limitation factors. Accounting for 2% of the pure types of participants and 2% of the blended participants, the only statistically significant relationship that emerged was between Canadians and the Convenience-Oriented ($p < .01$, $df = 1$). The Convenience-Oriented is a new type of participant, emerging from Arsenault's (1996) Experimenter. There is no similarity to the types of people reported by Houle or Cohen.

The **Opportunist** is the type of participant who is not particularly interested in attending classes, an interesting point when one considers that the Program factor has the greatest influence on program choice. The Opportunist is described by other participants as the one who 'sticks out like a sore thumb' and may be ostracised by the regular participants (Arsenault, 1996). While only 1% of the pure participants and 3% of the blended types were Opportunists, a chi-square test revealed that all planned to attend accompanied ($p < .01$, $df = 1$).

The Opportunist bears no resemblance to Cohen's typology but does have some similarity to Houle's (1961) Activity-Oriented which he described as a person who takes "part in

learning primarily for reasons unrelated to the purposes or content of the activities in which they engage" (p. 19) and to escape. The similarity stops there however for Houle's Activity-Oriented may be motivated by a social need or desire for credits, which are not characteristics of the Opportunist.

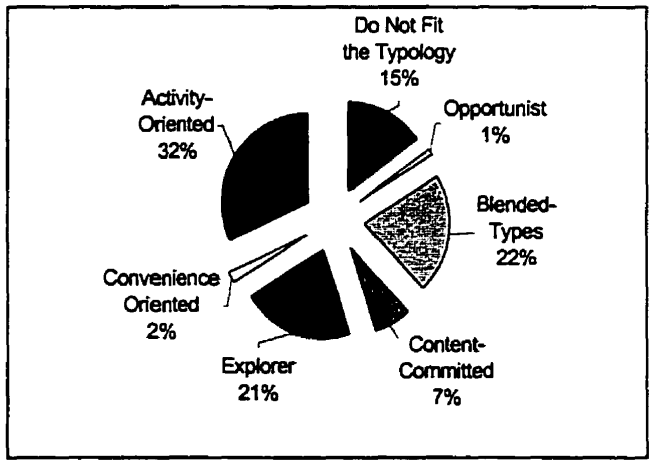
**Figure 43 The Opportunist: Arsenault, 1998**




This section discussed the commonalties and similarities between the different participant types, for while they are unique, they are not mutually exclusive categories because " ... there is no sharp line that divides such people from the rest of mankind" (Houle, 1961, p. 4) and certain characteristics will be similar to all who engage in particular activity. Nonetheless, typologies do enhance understanding and provide a way to simplify complex phenomena (Bailey, 1994, Patton, 1990).

One of the analyses performed was to determine the percentage of participants that represented pure and blended participant types. The term 'pure participant' in this study referred to the fact that these individuals, by virtue of their responses, could be typed into one category (e.g. Explorer). Individuals who could not be typed into a single category were identified as 'blended types' (e.g. Explorer/Activity-Oriented). As Figure 44 illustrates, the largest number of participants were described as Activity-Oriented (32%), Explorer (21%), and blended types (22%). Of the blended types, the largest percent identified

**Figure 44 Types of Participants Represented in the Total Sample**



themselves as both an Explorer and Activity-Oriented person. As a result of this distinction, fully 64% of the sample population is represented in by the Explorer, Activity-Oriented and a combination of the Explorer/Activity-Oriented.

### 5.2.3 The Interaction between Participant Type and Choice Factors

To gain some insight into the demographic characteristics related to each type, Table 53 was constructed and provides synthesis of the four demographic variables considered in this study, plus age. It is interesting to note the similarities in the statistically significant relationships between the Explorer and the Activity-Oriented which represent respectively 21% and 32% of the total sample population and, that the Activity factor was an important predictor for both types of participants. The fact that a statistically significant relationship was found between Canadians and the Convenience-Oriented supports the decision to redefine this participant type that is more related to a desire to find a program near home, rather than because one is a new participant. The number of pure Content-Committed represents only 7% of the total population sampled, yet throughout the statistical analyses this type remained unique unto itself and therefore should not be discarded in favour of the Explorer and Activity-Oriented. Rather, it would be interesting to determine which topics of study interest the Content-Committed so that these program areas could be enhanced. The Opportunist (1%) and Convenience-Oriented (2%) represent a very small percent of the total population. It is this authors position that an Opportunistic type of participant probably exists in most programs and does not warrant further investigation. However, the Convenience-Oriented represents a new participant type, and throughout the multivariate analyses, when slight differences were found, they were most often attributed to the Convenience oriented. It would be premature to dismiss further exploration of the Convenience-Oriented. Rather, based on what is known to date, a qualitative inquiry may bring deeper insight and greater understanding about this participant type.

**Table 53 The Pure Participant Types and their Demographic Characteristics**

| Pure Types | Explorer | Activity-Oriented | Content-Committed | Convenience Oriented | Opportunist |
|---|---|---|---|---|---|
| Two Best Predicting Factors | Location<br>Activity | Activity<br>Personal Limitation | Program<br>Organizational Attributes | Accessibility<br>Location | Program<br>Cost |
| Average Age | 69 | 68 | 68 | 67 | 67 |
| Statistically significant chi-square relationships | Females,<br>Americans<br>Return Participants<br>Accompanied | Females<br>Americans<br>Return Participants<br>Accompanied | Female<br>Return Participants | Canadians | Accompanied |
| Gender | 75% Female | 63% Female | 68% Female | 58% Female | 60% Male |
| Country | 69% American | 58% American | 53% Canadian | 74% Canadian | 80% American |
| Enrolment | 84% Return Participants | 79% Return Participants | 84% Return Participants | 53% New Participants | 70% Return Participants |
| Alone versus Accompanied | 74% Accompany | 84% Accompany | 62% Accompany | 69% Accompany | 100% Accompany |
| n = 523 (pure) | 172 | 262 | 60 | 19 | 10 |

## 5.2.4 From Academic Research to Practical Application

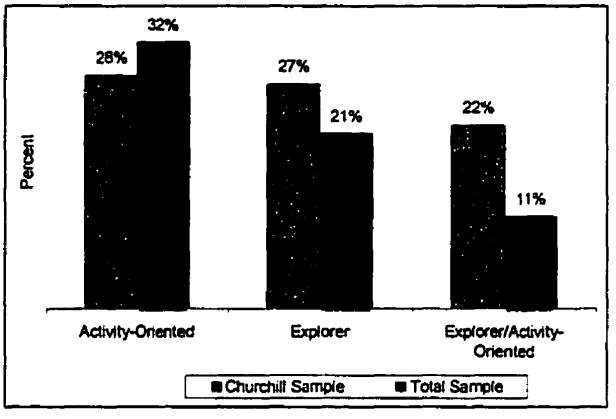
We are living in an information society and research is just one of the many ways to procure new information. A challenge to the research community is to find ways to share discoveries with people outside the academic community, who have an interest in, or application for, the research findings. According to Taylor, Rogers, and Stanton (1994), researchers must be able to translate their findings into something that can be used by the people who work with the subjects being studied, the programs being evaluated, or the products being developed. The purpose of this final section is to illustrate how the information on the factors influencing program choice and the participant typology can be synthesized to help a program co-ordinator, at a specific location, better understand the type of person who is attracted to their program.

The program in Churchill Manitoba was selected for this analysis because it was the site with the largest number of participants in the study sample (115) and because many of the written responses commented on this program. To begin, a quick demographic comparison of the Churchill participants against the total sample revealed the people who enrolled in the four programs offered were similar in age, gender, and whether they planned to attend alone or accompanied. Interesting differences however emerged with the country and enrolment vari-

ables. Comparatively, the percent of Americans and new participants was higher in Churchill than the total population. The statistical details of these calculations are located in Appendix T.

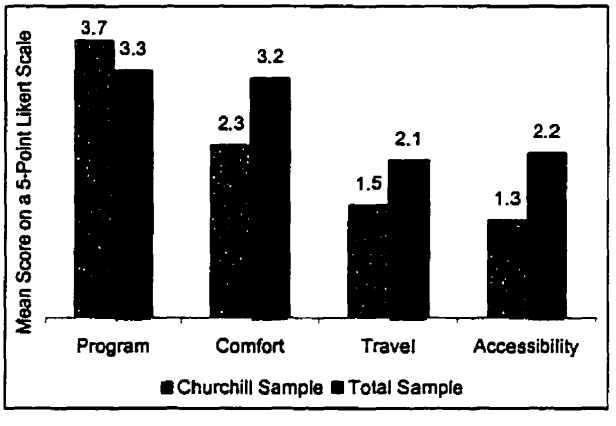
Comparing the Churchill participant to the total population according the typology, one discovers that there is no Convenience-Oriented and no Opportunist enrolled in these Northern Canadian programs. The overwhelming majority (77%) of the people enrolled were categorized as pure and blended Activity-Oriented and Explorers (Figure 45).

**Figure 45 Comparison of Dominant Participant Types**




A comparison of the mean scores for the factors influencing program choice revealed that, for the Churchill participant, the program factor was most important to the participants, and interestingly enough, the Comfort, Travel, and Accessibility factors were of less importance (Figure 46). Virtually no difference was found between the total population and the Churchill subset with respect to six factors: organizational attributes, information, activity, cost, escape, and personal limitation.

**Figure 46 Largest Difference in Mean Factor Scores**




Finally, a step-wise regression analysis revealed that, consistent with the total population, the Activity-Oriented could best be predicted using the activity factor ($R = 0.81$). However, the personal limitation factor, which was useful in predicting the Activity-Oriented in the sample population, did not emerge in the regression findings with the Churchill Activity-Oriented. The regression results for the Explorer revealed that the best predicting factors for the Churchill participant were the Location, Social, Attend Accompanied and Single factors. Based on this mini comparative analysis of the Churchill subset, the researcher would recommend that the site co-ordinator for this program consider targeting Americans and first-time participants, and create

marketing materials (or write their catalogue descriptions) that emphasize the benefits that are attractive to the Explorer and Activity-Oriented participant types.

It has been stated that market segmentation data is of considerable value (Etzel, 1982). By understanding the types of people attracted to programs and the factors influencing program choice, program planners will be in a better position to develop and market programs that meet the needs of a diverse and ever changing community of older adult learners and educational-travellers.

## 5.3 Future Research Opportunities

The choice of an educational-travel program does not occur in a vacuum. Rather, every time a participant chooses a program, he or she will be influenced by a variety of internal and external factors including their values, needs, attitudes, and perceptions. The purpose of this study was to gain a better understanding of the factors influencing the choice of an educational-travel program and the type of participants attracted to this type of program.

This was an exploratory study, and as such, the findings represent a starting point for further inquiry. This study contributes to the limited, but growing, body of knowledge on older adults and educational-travellers. The beauty of exploratory research is that it opens the door to a variety of new possibilities for future study that will lead to learning more about a segment of the population that will increase in numbers with each passing decade for the next forty years. While the opportunities are plenty, six recommendations for future research are provided.

The first recommendation is to continue examining the factors influencing program choice using different educational-travel programs, thus enabling the results to be generalized. The factors presented here can form the base for a future study; however, future studies will want to delve into the leisure studies research in greater detail to add yet another layer of understanding to the educational-travel participant. Additionally, because of the impact of the seasonal factor on pleasure travellers, any future educational-travel study will be enriched by sampling participants in the winter, spring, summer, and fall to determine if certain factors influencing program choice are more important at particular times of the year.

A study aimed at developing participant profiles, based on the typologies identified in this study and including demographic and psychographic information, would make a valuable contribution to understanding the educational-travel participant. Table 54 diagrams a framework

that could serve as a starting point for a subsequent study that would incorporate the educational, travel and leisure preferences of participants enrolled in this type of program.

**Table 54 Future Typology Study**

| Demographics and Psychographics: | Explorer | Activity-Oriented | Content-Committed | Convenience-Oriented | Opportunist |
|---|---|---|---|---|---|
| Educational Lifestyle | | | | | |
| Travel Lifestyle | | | | | |
| Leisure Lifestyle | | | | | |
| Benefits Sought | | | | | |
| Demographic Information | | | | | |

A third recommendation is to examine the factors influencing the choice of an educational-travel program using a push-pull framework as illustrated in Table 55. Programmers, educators, administrators and people who market programs would benefit from understanding the push factors that compel an individual to enrol in an educational-travel program, and the pull factors that make a specific program attractive.

**Table 55 Framework for Seasonal Influence Analysis**

| | Winter | Spring | Summer | Autumn |
|---|---|---|---|---|
| Push Factors | | | | |
| Pull Factors | | | | |

The fourth recommendation is to ground a program choice study within the decision-sciences and examine how joint decision-making impacts the selection of an educational-travel program or community based older adult education program. As most older adults prefer to enrol in a program with a companion (Sage Group, 1993), research aimed at developing an understanding of the influence of families and friends on program choice is important. At present there is no research on joint decision-making as it pertains to the older adult learner or educational-travel participant.

The fifth recommendation is to gain a better understanding of the older female in educational-travel or community based educational programs. Despite the fact that gender was

found to be less important than originally anticipated in this study and van Harssel's (1994) study of senior travellers, females Nonetheless, represent the largest percentage of older adults participating in educational activities (Harold, 1992). If traditional demographic trends persist, women will continue to be the majority in older adult programs and understanding their needs will be critical. Harold (1992) highlights the fact that until the 1970s, older women were virtually unrecognized in the literature and she criticizes the education community for not keeping pace with the challenges facing older women. Knowing that educational-travel is a desired outlet for both single and married older adult women, a study aimed at understanding the older adult-female educational-traveller would make a valuable contribution to the literature and provide valuable information to practitioners.

Finally, it would be extremely interesting if a future study could isolate and differentiate the factors that influence the choice of an educational program versus those factors that influence the choice of a learning venue.

## 5.4 Conclusion

> At the leading edge of the older population is a core of people who are "young-old, affluent-old, and educated-old" – an assertive middle-class constituency that is increasingly conscious of the options still available to them. These are the elders who are ready – physically, mentally, and financially – for new experiences. (Mills, 1993 p. 157)

This statement describes Elderhostelers, older adults who enjoy educational-travel. While it is true that not every retiree will be eager to enrol in an educational-travel program, one can anticipate this type of program to grow in popularity, particularly as the Baby Boomers begin to retire and have time to travel and learn. The cheery outlook for developing innovative programs, designed to meet unique combinations of learning and travel needs. Therefore, growth in this field will not be without its challenges for several reasons.

First, the upcoming generation of retirees, the Baby Boomers, have a reputation for setting trends as they pass through each stage in life (Gartner, 1996). Lanquar (1994) cautions that if educational-travel is to succeed with future generations, organizations must start now to address capacity management issues to ensure that supply can meet future demand. It would be folly to assume that what is known about today's cohorts of older adult learners and educational-

travellers will hold for all future retirees. Rather, what is known today, should be used as a foundation on which to build a better understanding for tomorrow.

A second challenge concerns women. Future generations of women will be less emotionally, socially, and financially dependent on men than current cohorts of senior women (van Harssel, 1994). What impact this will have on educational-travel programs is still unknown. Programmers will be wise to ensure that the benefits, accrued by participating educational-travel programs, are attractive to both the single female participant as well as those who attend with a companion.

Another challenge, which does not surface in the education literature but has an impact on the tourism industry, is tourist terrorism – which is related to the social, political, and cultural violence that exists in the world today (Lanquar, 1994). Despite the limited amount of research on seniors, one consistent finding is that older adults enjoy safe and comfortable environments (Arsenault, 1996; Mills, 1993; Muller, 1994). Educational-travel programmers are well advised to avoid developing programs in unstable countries or regions.

Finally, there are technological extremes with older adults that must be acknowledged as organizations reach out to meet the needs of people aged 55 years though 100+ (Lanquar, 1994). While some seniors will embrace technology and enjoy 'surfing the net' for information, registering on line, and even developing a network of cyber-citizens to communicate with, there will be others at the opposite end of the spectrum who will avoid these innovations like the plague. When reaching out to older adult learners, remaining cognisant of the generational effect of marketing will be important.

The 'Age of Ageing' brings with it a new paradigm of ageing, set within a new social context (Levy, 1992). Today's older adults are healthier, better educated, and more financially secure than any generation before (Jean, 1994; Martin & Preston, 1994) and finding new opportunities to enjoy a rewarding retirement will become even more important as life expectancy increases and the number of years one spends in retirement is extended. Educational-travel is but one program option that has met with success in catering to the learning and travel needs of a niche market of well educated, financially secure, older adults. While the future looks promising for educational-travel programs to meet the needs of older adults who enjoy learning and travelling as a form of leisure, it is important to remember that this type of program will not be for everyone.

Older adults are highly diverse in terms of the speed at which they age socially, psychologically, physically and emotionally (Moschis, 1992) and it is imperative that the range of educational programs, particularly at the community level, responds to this diversity. It is the responsibility of the people who provide educational programs, in every community, to ensure a wide range of learning opportunities exist so that all older adults, not just the financially secure and well-educated, can improve their quality of life and be enriched by learning in retirement.

# 6. REFERENCES


Adair, S. R., & Mowsesian, R. (1993). The meanings and motivations of learning during the retirement transition. *Educational Gerontology, 19*, 317-330.

Adamson, S., & Brobyn, A. (1994, Aug 7 - 10). *Critical issues in programming partnerships.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Anderson, G. (1998). *Fundamentals of educational research.* (2nd ed.). London: Falmer Press.

Anderson, M. (1989). Why people travel. In C. Lyne (Ed.), *Leisure travel and tourism* (2nd ed.). Wellesley, MA: Institute of Certified Travel Agents.

Arsenault, N. (1996). *Understanding older adults in education: Decision-making and Elderhostel.* Unpublished MA thesis, McGill University, Montreal, QC.

Arsenault, N. (1998). Typologies and the leisure learner. *Ageing International, Winter/Spring,* 64-74.

Arsenault, N., Anderson, G., & Swedburg, R. (1998). Understanding older adults in education: Decision-making and Elderhostel. *Educational Gerontology, 24* (2), 101-114.

Arsenault, N., Swedburg, R., & Williston, R. (1997, Oct). *Education and travel: A winning combination.* Proceedings from the Third Age Learning International Studies, Parana, Argentina.

Arsenault, N., Williston, R., Swedburg, R., & Anderson, G. (1997, 20 Aug 1997). *Education, leisure & travel: The program choice of older adult learners.* Proceedings from the Fourth Global Classroom Conference, Maastricht, The Netherlands.

Arsenault, N. L., & Anderson, G. (1998). New learning horizons for older adults. *Journal of Physical Education, Recreation and Dance: Leisure Today, 69* (3), 27 - 31.

Bailey, K. D. (1994). *Typologies and taxonomies: An introduction to classification techniques.* (Vol. 102). Thousand Oaks: Sage.

Bass, S. A. (1986). Matching educational opportunities with the able elderly. *Lifelong learning, 9* (5), 4-7.

Bello, D. C., & Etzel, M. J. (1985). The role of novelty in the pleasure travel experience. *Journal of Travel Research, 24* (1), 20-26.

Bodger, D. (1994, Aug 7 - 10). *Global networking – building partnerships.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Bodger, D. (1997a, Aug 20 - 23). *Capitalising on the investment promoting quality learning on study tours.* Proceedings from the Fourth Global Classroom: An International Symposium on Educational Tourism, Maastricht, The Netherlands.

Bodger, D. (1997b, Aug 20 - 23). *Introductory address.* Proceedings from the Fourth Global Classroom: An International Symposium on Educational Tourism, Maastricht, The Netherlands.

Boshier, R. (1971). Motivational orientations of adult education participants: A factor analytic exploration of Houle's typology. *Adult Education Journal, 21* (2), 3-26.

Boshier, R. (1973). Educational participation and dropout: A theoretical model. *Adult Education, 23* (4), 255-282.

Boshier, R. W. (1977). Motivational orientations of adult education participants: A factor analytic exploration of Houle's typology. *Adult Education Journal, 21* (2), 3-26.

Boshier, R. (1989). Participant Motivation. In C. J. Titmus (Ed.), *Lifelong education for adults: An international handbook* (pp. 147-151). Toronto: Pergamon Press.

Boshier, R. (1991). Psychometric properties of the alternative form of the education participation scale. *Adult Education Quarterly, 41* (3), 150-167.

Boshier, R., & Collins, J. B. (1985). The Houle typology after twenty-two years: A large-scale empirical test. *Adult Education Quarterly, 35* (3), 113-130.

Brookfield, S. D. (1986). *Understanding and facilitating adult learning*. San Francisco: Jossey-Bass.

Calantone, R. J., & Johar, J. S. (1984). Seasonal segmentation of the tourism market using a benefit segmentation framework. *Journal of Travel Research, 23* (2), 1984.

Canadian Tourism Commission. (1997). *Challenges for Canada's tourism industry* [Article posted on the World Wide Web]. Retrieve 20 April 1997, from the World Wide Web: http://206.191.33.50/tourism/business/challenge/challng1.html

Carp, A., Peterson, R., & Roelfs, P. (1974). *In K.P. Cross (1992) Adults as learners: Increasing participation and facilitating learning*. San Francisco: Jossey Bass.

Carroll, J. S., & Johnson, E. J. (1990). *Decision research: A field guide*. (Vol. 22). Thousand Oaks, CA: Sage.

Clough, B. S. (1992a). Broadening perspectives on learning activities in later life. *Educational Gerontology, 18*, 447-459.

Clough, B. S. (1992b). Learning activities in later life: Perhaps we are looking into the wrong windows. In J. E. Thornton & S. A. Harold (Eds.), Education in the Third Age. Vancouver: Pacific Educational Press.

Cohen, E. (1972). Toward a sociology of international tourism. *Social Research, 39* (1), 164-182.

Cohen, E. (1974). Who is a tourist? A conceptual clarification. *Sociological Review, 22* (4), 527-555.

Cohen, E. (1979). Rethinking the sociology of tourism. *Annals of Tourism Research, 1* (1), 18-35.

Conter, R. (1994, Aug 7 - 10). *Measuring the economic impact of older adult education/travel expenditures*. Proceedings of the Third Global Classroom Conference: Educational Tourism and the Needs of Older Adults, Montreal, QC.

Crompton, J. L. (1979). Motivations for pleasure vacation. *Annals of Tourism Research, 6* (4), 408-424.

Crompton, J. L., & Lamb, C. W., Jr. (1986). *Marketing government and social services*. Toronto: John Wiley & Sons.

Cross, K. P. (1981). *Adults as learners.* San Francisco: Jossey Bass.

Cross, K. P. (1992). *Adults as learners: Increasing participation and facilitating learning.* San Francisco: Jossey-Bass.

Dann, G. M. (1981). Tourist motivation: An appraisal. *Annals of Tourism Research, 8* (2), 187-219.

Dann, G. M. (1997). Paradigms in tourism research. *Annals of Tourism Research, 24* (2), 1997.

Darkenwald, G., G., & Merriam, S. B. (1982). *Adult education: Foundations of practice.* San Francisco: Harper & Row.

Elderhostel Canada. (1997). Elderhostel Canada fall catalogue. Kingston, ON: Author.

Elderhostel Canada. (1998). Fall 1997 program statistics. Kingston, ON: Author

Elderhostel Inc. (1994). Information prepared for the Strategic Planning Committee. Dedman, MA.

Elderhostel Inc. (1998a). *The Elderhostel Organization: Mission Statement.* [Information posted on the World Wide Web]. Boston, MA: Author. Retrieved 02 June 1998 from the World Wide Web: http://www.elderrhostel.org/EHORG/

Elderhostel Inc. (1998b). *Facts about Elderhostel.* [Information posted on the World Wide Web]. Boston, MA: Author. Retrieved 02 June 1998 from the World Wide Web: http://www.elderhostel.org/pubrel/genfac.htm

Etzel, M. J., & Woodside. (1982). Segmenting vacation markets: The case of the distant and near-home traveller. *Journal of Travel Research, 20*(4), 10-14.

Fink, A. (1995). *How to analyze survey data.* (Vol. 8). Thousand Oaks: Sage.

Fisher, J. C. (1986). Participation in educational activities by active older adults. *Adult Education Quarterly, 36* (4), 202-210.

Fisher, R. J., & Price, L. L. (1991). International pleasure travel motivations and post-vacation cultural attitude change. *Journal of Leisure Research, 23* (3), 193-208.

Fodness, D. (1994). Measuring tourist motivation. *Annals of Tourism Research, 21*, 551-581.

Foot, D. K. (1996). *Boom, bust & echo: How to profit from the coming demographic shift.* Toronto: Macfarlane Walter & Ross.

Fujita-Stark, P. J. (1996). Motivations and characteristics of adult students: Factor stability and construct validity of the educational participation scale. *Adult Education Quarterly, 47* (1), 29-40.

Gall, M. D., Borg, W. R., & Gall, J. P. (1996). *Educational research: An introduction.* (6th ed.). White Plains, NY: Longman.

Gartner, H. (1996). *Friday survival guide: How to fight fifty* [Documentary]. Toronto: CBC-TV.

Gibson, H. (1994, Aug 7 - 10). *Patterns of tourist role preferences among three groups of seniors: Ages 55-65, 66-75, and ages 76 and over.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Gnoth, J. (1997). Tourism motivation and expectation formation. *Annals of Tourism Research, 24* (2), 283-304.

Goodale, T. L., & Witt, P. A. (Eds.). (1985). *Recreation and leisure: Issues in an era of change.* College State, PA: Venture.

Harold, S. (1992). Education in later life: The case of the older woman. *Educational Gerontology*, 18, 511-527.

Harootyan, R. A. (1991). A brave new world of ageing in the 21st century. *Ageing International, 18* (1), 22-24.

Havighurst, R. (1969). Adulthood and old age. In R. L. Ebel (Ed.), *Encyclopaedia of Educational Research* (4th ed., pp. 57-66). London: MacMillan.

Havighurst, R. J. (1976). Education through the adult life span. *Educational Gerontology, 1*, 41-51.

Heil, W. A., & Marks, L. N. (1991). Resourceful ageing: Today and tomorrow. *Ageing International, 1 8* (1), 47-51.

Heischmidt, K. A. (1992). *Decision styles and information source preference.* Unpublished Doctoral dissertation, Southern Illinois University, Carbondale, IL.

Heisel, M. A., Darkenwald, G. G., & Anderson, R. E. (1981). Participation in organized educational activities among adults age 60 and over. *Educational Gerontology, 6*, 227-240.

Henry, G. T., & Basile, K. C. (1994). Understanding the decision to participate in formal adult education. *Adult Education Quarterly, 44* (2), 64-82.

Hiemstra, R. P. (1972). Continuing education for the aged: A survey of needs and interests of older people. *Adult Education, 22* (2), 100-109.

Hiemstra, R. (1976). Older adult learning: Instrumental and expressive categories. *Educational Gerontology, 1*, 227-236.

Hitchcock, P. (1994, Aug 7 - 10). *Travel preferences of older Canadians.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Houle, C. O. (1961). *The inquiring mind.* Madison: University of Wisconsin Press.

Ironside, D. J. (1989). The field of adult education. In C. Titmus, J. (Ed.), *Lifelong education for adults: An international handbook* (pp. 13-18). Toronto: Pergamon Press.

Jean, M. S. (1994, Aug 07-10). *The global classroom: Highlighting the needs of older adults.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Jenkins, R. L. (1978). Family vacation decision-making. *Journal of Travel Research, 16* (4), 2-7.

Johnson, R. A., & Wichern, D. W. (1992). *Applied multivariate statistical analysis*. Englewood Cliffs, NJ: Prentice Hall.

Johnstone, J. W., & J., R. (1965). In Cross (1992), *Adults as learners: Increasing participation and facilitating learning* (pp. 91-112). San Francisco: Jossey Bass.

Kaplan, M. (1981). Elderhostel: Using a lifetime of learning and experience. *Change, Jan/Feb*, 41.

Kerlinger, F. N. (1986). *Foundations of behavioral research.* (3rd ed.). Toronto: Harcourt Brace Javanovich College Publishers.

Kim, J., & Mueller, C. (1978). *Introduction to factor analysis: What it is and how to do it.* (Vol. 07-013). Newbury Park: Sage.

Kindra, G. S., Laroch, M., & Juller, T. E. (1994). *Consumer behavior: The Canadian perspective.* Scarborough, ON: Nelson Canada.

Knowles, M. (1989). Learning after retirement. *Adult Learning, 1* (3), 8-9.

Knowlton, M. P. (1977). Liberal arts: The Elderhostel plan for survival. *Educational Gerontology, 2*, 87-93.

Lengrand, P. (1989). Lifelong education: Growth of a concept. In C. J. Titmus (Ed.), *Lifelong education for adults: An international handbook* (pp. 5-9). Toronto: Pergamon Press.

Levy, J. (1992). Leisure and retirement in the new age wave society. *World Leisure & Recreation, 34* (1), 5 - 9.

Li-Liuan, L. R. (1997, Aug 20 - 23). *The role of study tours in cultural studies in adult education in Taiwan.* Proceedings from the Fourth Global Classroom: An International Symposium on Educational Tourism, Maastricht, The Netherlands.

Live It Up. (1993). Live it up: A guide to healthy active living in the senior years, *Communication with seniors*: Participaction Canada: Author

Longino, C. F., Jr. (1994). Mythos of an ageing America. *American Demographics, Aug*, 36-42.

Lue, C. (1992). *An exploratory analysis of multi-destination pleasure travel behavior.* Unpublished Doctoral dissertation, Texas A & M University.

Lue, C., Crompton, J. & Fesenmaier, D. (1993). Conceptualization of multi-destination pleasure trips. *Annals of Tourism Research, 20*, 289-301.

Mallory, J., & McCauley, F. (1998). *Elderhostel: Giving shape and meaning to senior adults' lives.* [Research findings posted on the Internet]. Boston, MA: Author. Retrieved 26 March 98 from the Internet: http://myles.elderhostel.org/webboard/$webb.exe/read?650.1

Manheimer, R. J., Snodgrass, D. D., & Moskow-McKenzie, D. (1995). *Older adults education: A guide to research, programs, and policies.* Westport, CT: Greenwood Press.

Mannell, R. C., & Iso-Ahola, S. E. (1987). Psychological nature of leisure and tourism experience. *Annals of Tourism Research, 14*, 314-331.

Martin, L. G., & Preston, S. H. (1994). *Demography of ageing.* Washington, DC: National Academy Press.

Maslow, A. H. (1954). *Motivation and personality.* New York: Harper Row.

McCourt, E. (1989). A history of travel. In C. Lyne (Ed.), *Leisure travel and tourism* (2nd ed.). Wellesley, MA: Institute of Certified Travel Agents.

McQueen, J., & Miller, K. E. (1985). Target market selection of tourists: A comparison of approaches. *Journal of Travel Research, Summer*, 3-6.

Meredith, G., & Schewe, C. (1994). The power of cohorts. *American Demographics, Dec*, 22-31.

Merriam, S. B., & Caffarella, R. S. (1991). *Learning in adulthood.* San Francisco: Jossey-Bass.

Mills, E. S. (1993). *The story of Elderhostel.* Hanover: University Press of New England.

Mo, C., Howard, D. R., & Havitz, M. E. (1993). Testing an international tourist role typology. *Annals of Tourism Research, 20,* 319-335.

Moore, E. G., & Rosenberg, M. W. (1997). Growing old in Canada: Demographic and geographic perspectives. Toronto: Statistics Canada in conjunction with ITP Nelson.

Morrison, A. M. , O'Learly, J. T., Hsieg, S. & Li, C. (1994, Aug 07-10). *Identifying educational opportunities for older adults using the Canadian travel survey.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Morstain, B. R., & Smart, J. C. (1974). Reasons for participation in adult education courses: A multivariate analysis of group differences. *Adult Education, 24* (2), 83-98.

Moschis, G. P. (1992). *Marketing to older consumers: A handbook of information for strategy development.* London: Quorum Books.

Muller, T. E. (1994, Aug 7-10). *The coming boom in educational travel.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Myers, P. B., & Moncrief, L. W. (1978). Differential leisure travel decision-making between spouses. *Annals of Tourism Research, 5* (1), 157-165.

Neuman, W. L. (1997). *Social research methods: Qualitative and quantitative approaches.* Toronto: Allyn and Bacon.

Nichols, C. M., & Snepenger, D. J. (1988). Family decision making and tourism behavior and attitudes. *Journal of Travel Research, 26* (4), 2-6.

Novak, M. (1987). The Canadian new horizons program. *The Gerontologist, 27* (3), 353-355.

O'Connor, D. M. (1987). Elders and higher education: Instrumental or expressive goals? *Educational Gerontology, 13,* 511-519.

Odyssey. (1995). *Elderhostelers and new media* . Dedman, MA.

Ostiguy, L., MacNeil, R., & Hopp, R. (1994, Aug 7 - 10). *Motivations and barriers of participants and non-participants to participate in Elderhostel programs in the province of Saskatchewan.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Hawkins, J. M. (Ed.). (1993). *The Oxford paperback dictionary: New Edition.* Toronto: Oxford University Press.

Patton, M. Q. (1990). *Qualitative evaluation and research methods.* Newbury Park: Sage.

Pearce, S. D. (1991). Toward understanding the participation of older adults in continuing education. *Educational Gerontology,* 451-464.

Pearman, G. (1997, Aug 20 - 23, 1997). *Proposing a research agenda for educational travel and tourism.* Proceedings from the Fourth Global Classroom: An International Symposium on Educational Tourism, Maastricht, The Netherlands.

Pitts, R. E., & Woodside, A. G. (1986). Personal values and travel decisions. *Journal of Travel Research, 25* (1), 21-25.

Queeney, D. S. (1995). *Assessing needs in continuing education: An essential tool for quality improvement.* San Francisco: Jossey-Bass.

Quintern-Reed, N. J. (1992). *Characteristics of successful long-term Elderhostel programs across diverse sites.* Unpublished Doctoral dissertation, The University of Georgia, Athens, GA.

Ray, D., Harley, A., & Bayles, M. (1983). *Values, life-long education and an ageing Canadian population.* London, ON: Third Eye.

Rice, K. (1986). *Factors which influence older adults to participate in education: The Elderhostel experience in Atlantic Canada.* Unpublished MA thesis, McGill University, Montreal, QC.

Roberto, K. A., & McGraw, S. (1990). Educational programs for older adults: Course selection and motivational factors. *Gerontology and Geriatrics Education, 10*(4), 37-47.

Robertson, T. S., & Kassarjian. (1991). *Handbook of consumer behavior.* Englewood Cliffs, NJ: Prentice-Hall.

Romaniuk, J. G., & Romaniuk, M. (1982). Participation motives of older adults in higher education: The Elderhostel experience. *The Gerontologist, 22* (4), 364-368.

Sage Group, T. (1993). *Evaluation and development prospects of Canadian educational programs and learning vacations for older adults.* Ottawa, ON: A Study Sponsored by Industry, Science and Technology Canada.

Scanlan, C. S., & Darkenwald, G. G. (1984). Identifying deterrents to participation in continuing education. *Adult Education Quarterly, 34* (3), 155-166.

Selman, G., & Dampier, P. (1991). *The foundations of adult education in Canada.* Toronto: Thompson Educational Publishers.

Sessoms, H. D. (1984). *Leisure services.* Englewood Cliffs, NJ: Prentice-Hall.

Shoemaker, S. (1989). Segmentation of the senior pleasure travel market. *Journal of Travel Research, 27* (3), 14-21.

Shoemaker, S. (1994). Segmenting the US travel market according to benefits realized. *Journal of Travel Research, 32* (3), 2-21.

Slatery, J. P. (1989). Place or Placelessness: Guiding tourism's future. In C. Lyne (Ed.), *Leisure travel and tourism* (2nd ed.). Wellesley, MA: Institute of Certified Travel Agents.

Smith, J. W., & Clurman, A. (1997). *Rocking the ages: The Yankelovich report on generational marketing.* New York: Harper Business.

Smith, T. M. (1995). *The educational progress of women* (NCES 95-768): The U.S. Department of Education: The National Centre for Education Statistics

Social Sciences & Humanities Research Council of Canada. (1997). *Striking the balance* (A five -year strategy for the social sciences and humanities research council of Canada 1996-2001 CR22-33/1997). Ottawa, ON: Social Sciences & Humanities Research Council of Canada.

Statistics Canada. (1997a). *A Portrait of Seniors in Canada.* (2nd ed.): Ottawa, ON: Housing, Family and Social Statistics Division

Statistics Canada. (1997b). *Population projections by age groups and sex.* [Statistics posted on the World Wide Web]. Ottawa, ON: Author. Retrieved 17 Dec 97 from the World Wide Web: http://www.StatCan.ca/english/Pgdb/People/Population/demo23a.htm.

Stevens, J. (1996). *Applied multivariate statistics for the social sciences.* (3rd ed.). Mahwah, NJ: Lawrence Erlbaum.

Swedburg, R. B. (1991, Oct) . *Reaching out to the senior market: A tourism and hospitality industry perspective.* A paper presented at Niagara University, ON.

Swedburg, R. B. (1992, 7 April). *Elderhostel: Lifelong learning and leisure education.* Paper presented at the Sandra A. Modisett Symposium on Ageing and Leisure in the 1990s Proceedings, Indianapolis, IN.

SYSTAT. (1996). *SYSTAT 6.0 for Windows: Data.* Chicago, IL: Microsoft.

Taylor, G. D., Rogers, J., & Stanton, B. (1994). Bridging the research gap between industry and researchers. *Journal of Travel Research, 32* (4), 9-12.

Thornton, J. E. (1992). Introduction. *Educational Gerontology, 18* (409-413).

TraveLearn. (1997). *Travel/study for adults: 1997 programs.* TraveLearn: Author.

U.S. Bureau of the Census. (1993). *Educational attainment: Report Series P20-476.* [Information posted on the World Wide Web]. Retrieved 06 Dec 97 from the World Wide Web: http://www.census.gov/population/www/pop-profile/educattn.htlm: Author.

U.S. Bureau of the Census. (1995). *Years of school completed by persons 25 years old and over by age and sex: Selected years 1940-1995.* [Statistics posted on the World Wide Web]. Retrieved 17 Dec 97 from the World Wide Web: http://www.census.gov/population/socdemo/education/table17.txt

U.S. Bureau of the Census. (1996a). *65+ in the United States.* Current Population Reports, Special Studies, P23-190. U.S. Government Printing Office.

U.S. Bureau of the Census. (1996b). *World population profile: 1996.* Report WP/96. Washington, DC: U. S. Government Printing Office.

Um, S., & Crompton, J. L. (1990). Attitude determinants in tourism destination choice. *Annals of Tourism Research, 17* (3), 432-448.

United Nations. (1994). *1994 Demographic Yearbook.* [Press Release posted on the World Wide Web]. New York: United Nations. Retrieved 12 Dec 97 from the World Wide Web: http://www.un.org/ plweb-cgi/idoc.pl...pr+pr++Population%26or%26

University of Nottingham Continuing Education Department. (1997). *Learn at leisure: Educational breaks 97 and summer schools* (pp. 12). University of Nottingham: Author.

University of the Third Age. (1996). University of the Third Age Program Information. Internet locator: http://www.uwa.edu.au/cyllenel/uwaga/u3a.html: Author.

University of Texas at Austin (1998). *Studies on Tour.* Austin, TX: Author.

Up With People. (1998). *About Up with People.* [Information posted on the World Wide Web]. Denver, CO: Author. Retrieved 14 March 98 from the World Wide Web: http://www.upwithpeople.org/about_uwp.html

van Harssel, J. H. (1994, Aug 7 - 10). *The senior market: Distinct, diverse and demanding.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Vandersluis, B. A., Modden, M., & Maguire, P. (1994, Aug 7 - 10). *Women on the go: A pilot study of demographic and behavioral characteristics of women travelling in recreational vehicles.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults, Montreal, QC.

Verschueren, J. (1995, Aug 7 - 10, 1994). *Study before you go? The promise and the pitfalls.* Proceedings from the Third Global Classroom Conference on Educational Tourism and the Needs of Older Adults., Montreal, QC.

Wallgren, A., Wallgren, B., Persson, R., Jorner, U., & Haaland, J. (1996). *Graphing statistics and data: Creating better charts*. Thousand Oaks, CA: Sage.

Walters, C. G., & Bergiel, B. J. (1989). *Consumer behavior: A decision-making approach.* Cincinnati: South-Western Publishing Co.

Waters, S. R. (1989). Travel industry world yearbook -- The big picture. In C. Lyne (Ed.), *Leisure travel and tourism* (2nd ed., ). Wellesley, MA: Institute of Certified Travel Agents.

Weber, R. P. (1990). *Basic content analysis*. (2nd ed.). (Vol. Series Number 07-049). Newbury Park, CA: Sage.

Williams, P. W., Dossa, K. B., & Hunt, J. D. (1997). The influence of weather context on winter resort evaluations by visitors. *Journal of Travel Research, 36* (2), 29-36.

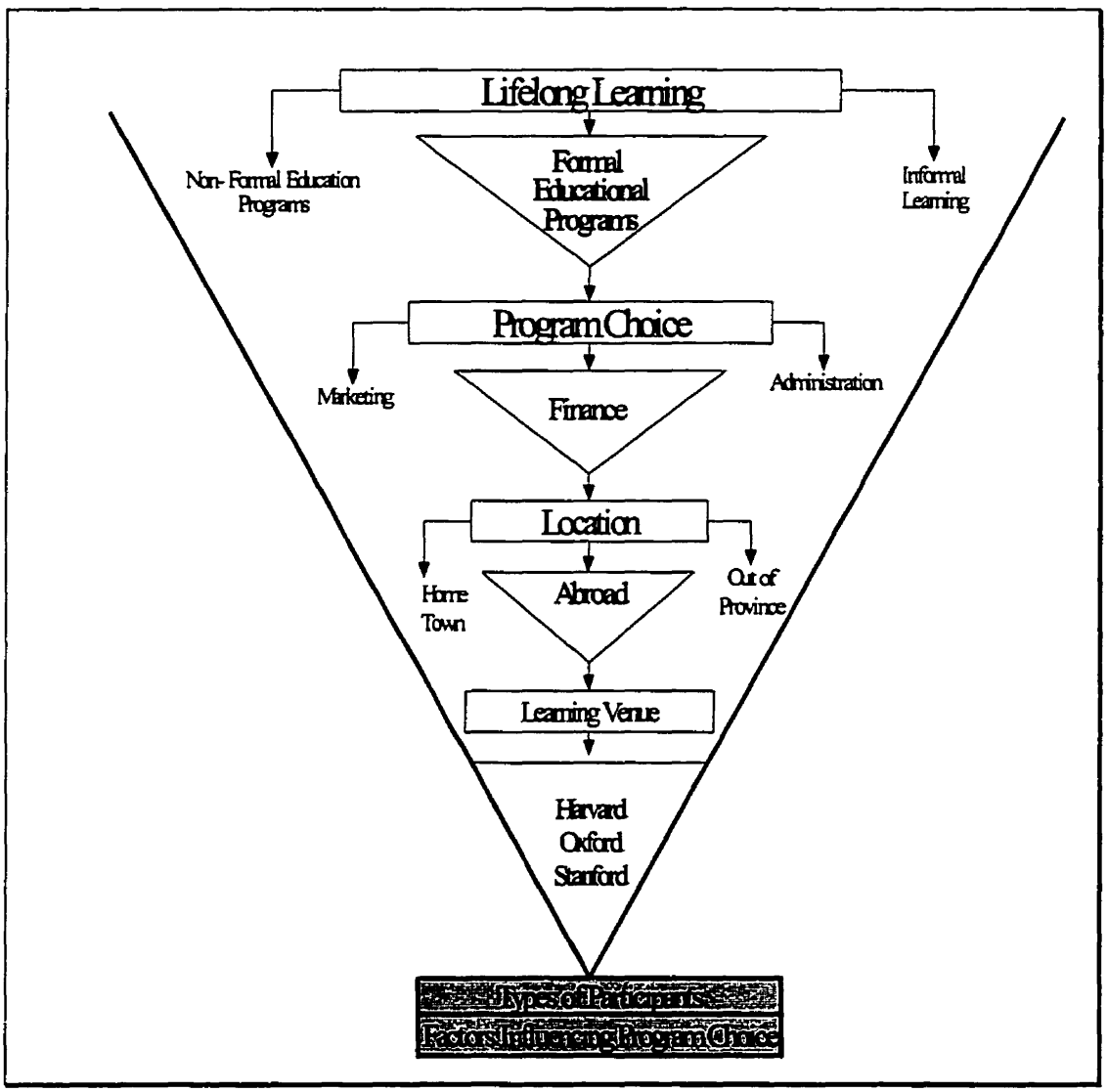
Wirtz, P. W., & Charner, I. (1989). Motivations for educational participation by retirees: The expressive-instrumental continuum revisited. *Educational Gerontology, 15*, 275-285.

Woodside, A. G., & Jacobs, L. W. (1985). Step two in benefit segmentation: Learning the benefits realized by major travel markets. *Journal of Travel Research, 24* (1), 7-13.

Yoon, K. P., & Hwang, C.L. (1995). *Multiple attribute decision making: An introduction.* (Vol. 107). Thousand Oaks: Sage.

# APPENDICES

## *Appendix A - An Alternative Display of the Decisions Made in the Educational Choice Funnel*



# *Appendix B - The Questionnaire*

# OLDER ADULT LEARNERS: SO MANY CHOICES

A Collaborative Research Project

between

McGill University, Faculty of Education

and

ELDERHOSTEL Canada

1997

# Older Adult Learners: So Many Choices

The purpose of this questionnaire is to learn more about what is important to you when selecting an ELDERHOSTEL Canada program. Because you have recently registered for a fall program, you are in a favourable position to help. Thank you for your time.

## 1. Historical Information

1.1 Which Fall 1997 ELDERHOSTEL Canada program have you registered for?

_____ ***(LOCATION)*** _____ ***(DATES)***

(If you are registered for more than one program, indicate the first you will attend).

1.2 When did you <u>decide</u> to attend this specific Elderhostel? ***(PLEASE CHECK ONE)***

- ☐ I just recently decided
- ☐ 2 to 3 months ago
- ☐ 4 to 6 months ago
- ☐ 7 to 12 months ago
- ☐ over one year ago
- ☐ I can't remember

1.3 Why did you select this particular program?

_____

_____

_____

_____

1.4 What information sources influenced your program choice? ***(CHECK ALL THAT APPLY)***

- ☐ The Canadian Elderhostel catalogue
- ☐ The USA Elderhostel catalogue
- ☐ An Elderhostel staff member
- ☐ Information found on the Internet
- ☐ A Word of mouth recommendation from: _____
- ☐ Other: _____

1.5 How do you plan to travel? ***(CHECK ALL THAT APPLY)***

| | |
|---|---|
| ☐ Automobile | ☐ Train |
| ☐ Recreational Vehicle | ☐ Aeroplane |
| ☐ Bus | ☐ Other:_____ |

1.6 Will this be your first Elderhostel?

☐ Yes ☐ No, I have attended: _____ Elderhostel programs in Canada
_____ Elderhostel programs in the United States
_____ International Elderhostel programs

1.7 When you think of being in an Elderhostel program, do you think of it primarily as: ***(CHECK ONLY ONE)***

☐ An educational experience
☐ A vacation
☐ A recreation / leisure activity
☐ An opportunity to socialize
☐ Other: _____

1.8 What are your favourite months for attending Elderhostel? ***(CIRCLE ALL THAT APPLY)***

| | | | | | | |
|---|---|---|---|---|---|---|
| January | February | March | April | May | June | ALL |
| July | August | September | October | November | December | |

Please explain.

_____

_____

_____

_____

1.9 Please check the box that most accurately describes your **current employment status.**

☐ Fully retired
☐ Employed/self-employed part-time
☐ Employed/self-employed full-time
☐ Other: _____

## 2. What type of person are you?

On a scale of 1 to 5, circle the number that indicates how similar you are to the description.

2.1 You love exploring and look for a program that takes you to a part of the world you have never seen to learn about the local area, history, people, or customs.

← 1 2 3 4 5 →

THAT'S NOT ME AT ALL THAT SOUNDS LIKE ME

2.2 You like adventure and are willing to go anywhere and try most anything to enjoy new experiences in learning and socializing. You will even sacrifice the amenities in the accommodations to participate in an interesting program.

← 1 2 3 4 5 →

THAT'S NOT ME AT ALL THAT SOUNDS LIKE ME

2.3 You still feel like a newcomer and are some what nervous about 'going back to school'. To feel more comfortable you look for a familiar subject area in a program close to home.

← 1 2 3 4 5 →

THAT'S NOT ME AT ALL THAT SOUNDS LIKE ME

2.4 You are not particularly interested in attending classes, rather you are attracted to this program because of the affordable accommodations and convenient meal times.

← 1 2 3 4 5 →

THAT'S NOT ME AT ALL THAT SOUNDS LIKE ME

2.5 You are passionate about studying a favourite subject and only consider registering for a program that can advance your knowledge in this area.

← 1 2 3 4 5 →

THAT'S NOT ME AT ALL THAT SOUNDS LIKE ME

2.6 You prefer a program where the learning is combined with some form of physical activity, preferably outdoors. You avoid programs where you think most of the learning will take place sitting in a classroom.

← 1 2 3 4 5 →

THAT'S NOT ME AT ALL THAT SOUNDS LIKE ME

## 3. Decisions

How important were each of the following items when you selected your fall 1997 ELDERHOSTEL Canada program. If an item is not applicable/relevant please circle: N/A

| *(PLEASE CIRCLE ONE NUMBER PER LINE)* | | Not Important ↔ Extremely Important | | | | | |
|---|---|---|---|---|---|---|---|
| 3.1 | Studying a specific topic | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.2 | Finding a program that involved being outdoors | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.3 | Expanding my knowledge | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.4 | Studying at a college or university | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.5 | Finding a program with minimal physical activity | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.6 | Forgetting personal worries | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.7 | Being with people who share my learning interest | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.8 | Finding a shared interest with my travel companion | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.9 | Returning to a specific site | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.10 | Finding a program that included educational field trips | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.11 | Studying at a commercial site (i.e. hotel, lodge) | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.12 | Accessibility by car | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.13 | Enjoying a certain climate | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.14 | Driving to the site in less than 6 hours | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.15 | Experiencing a different culture | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.16 | Following a program with one learning theme | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.17 | Seeking a high level of physical activity | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.18 | Agreeing on an Elderhostel with my travel companion | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.19 | Forgetting responsibilities at home | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.20 | Coordinating dates with a travel companion | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.21 | Being part of a group | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.22 | Accommodating a physical limitation (i.e. walking) | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.23 | Accessibility by bus or train | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.24 | Satisfying a curiosity about a geographical area | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.25 | Learning with people my own age | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.26 | Having a change from my daily routine | 1 | 2 | 3 | 4 | 5 | N/A |

| *(PLEASE CIRCLE ONE NUMBER PER LINE)* | | Not Important | | ↔ | | Extremely Important | |
|---|---|---|---|---|---|---|---|
| 3.27 | Availability of single beds | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.28 | Exploring a particular geographic area | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.29 | Finding a program with a sports option | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.30 | Accessibility by airplane | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.31 | Meeting new people | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.32 | Learning something new | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.33 | Taking a holiday before or after Elderhostel | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.34 | Accommodating a sensory limitation (i.e. hearing) | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.35 | Attending 2 or more Elderhostel programs 'back to back' | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.36 | Visiting family or friends in the local area | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.37 | Availability of single rooms | 1 | 2 | 3 | 4 | 5 | N/A |
| ***OTHER REASONS:*** | | | | | | | |
| 3.38 | The cost of travelling to and from the site | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.39 | Advice from Elderhostel site coordinators or employees | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.40 | A choice of 3 different courses at one site | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.41 | The bed size: (Specify _____) | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.42 | The Canadian dollar exchange rate | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.43 | A previous positive experience at a site | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.44 | Private bath/shower facilities | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.45 | The reputation of Elderhostel | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.46 | Descriptions in the Elderhostel catalogue | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.47 | The reputation of the Elderhostel site | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.48 | The program registration fee | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.49 | Word of mouth recommendation | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.50 | Private toilet facilities | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.51 | The cost of single rooms | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.52 | A previous positive ELDERHOSTEL Canada experience | 1 | 2 | 3 | 4 | 5 | N/A |
| 3.53 | Other: List: _____ | 1 | 2 | 3 | 4 | 5 | |

## 4. Activity History

4.1 How many years of formal schooling have you had past high school? _____

4.2 Which of these activities have you done in the past few years? ***(CHECK ALL THAT APPLY IN BOTH COLUMNS)***

| | Last Year | Past 3 Years |
|---|---|---|
| 1. Classes at a university or college ..... | ☐ 1a | ☐ 1b |
| 2. An Institute for Learning in Retirement program ..... | ☐ 2a | ☐ 2b |
| 3. Vacationing on a guided tour ..... | ☐ 3a | ☐ 3b |
| 4. Volunteer work ..... | ☐ 4a | ☐ 4b |
| 5. An organized leisure activity (i.e. bridge/garden club) ... | ☐ 5a | ☐ 5b |
| 6. Religious study ..... | ☐ 6a | ☐ 6b |
| 7. Playing golf, tennis or another sport ..... | ☐ 7a | ☐ 7b |
| 8. Participating in music, drama or art activities ..... | ☐ 8a | ☐ 8b |
| 9. Taking automobile day trips ..... | ☐ 9a | ☐ 9b |
| 10. Taking over-night trips ..... | ☐ 10a | ☐ 10b |
| 11. Other: _____ | ☐ 11a | ☐ 11b |

## 5. Traveling with a Companion

5.1 Do you plan to attend this Elderhostel alone?

☐ Yes ..... ***( GO TO THE LAST PAGE, SECTION 6)***
☐ No, I plan to attend with my: ☐ Spouse
☐ Friend
☐ Other: _____ ***(LIST)***

5.2 Is the person you planned on attending with .....? ***(PLEASE CHECK ONLY ONE)***

☐ Male
☐ Female
☐ I plan to attend with more than one companion

5.3 Think back to when you were selecting this Elderhostel. Who made the following decisions?

| | I Decided | Partner Decided | Joint Decision |
|---|---|---|---|
| 1. The decision to enroll with Elderhostel | ☐ 1a | ☐ 1b | ☐ 1c |
| 2. The choice of geographical location | ☐ 2a | ☐ 2b | ☐ 2c |
| 3. The type of program (i.e. history) | ☐ 3a | ☐ 3b | ☐ 3c |
| 4. The method of travel (i.e. car, train) | ☐ 4a | ☐ 4b | ☐ 4c |
| 5. The distance you would travel to reach the site | ☐ 5a | ☐ 5b | ☐ 5c |
| 6. The type of accommodations | ☐ 6a | ☐ 6b | ☐ 6c |
| 7. The dates you were able to attend | ☐ 7a | ☐ 7b | ☐ 7c |
| 8. The final program choice | ☐ 8a | ☐ 8b | ☐ 8c |

## 6. Summary

6.1 Is there any additional information you would like to share that would help us better understand who you are and what was important to you when you selected this ELDERHOSTEL Canada program?

**Thank you for completing this questionnaire.**

Your cooperation is greatly appreciated.
Kindly place this questionnaire in the enclosed envelope and
**return it before 20 September 1997 to:**

Nancy Arsenault
Centre for Educational Leadership
Mc Gill University
3724 McTavish Street
Montreal, Quebec
H4A 1Y2
Canada





# 372

# *Appendix C - Informed Consent Form*

# McGill University Informed Consent Form

****Please return this form with the Questionnaire****

**McGill University requires that all people who agree to participate in a research project provide their written consent confirming the following:**

I am aware that the purpose of this research is to gather information that will be used to better understand the educational choices of people who register for Elderhostel programs. I understand that the information I provide will be kept strictly confidential and my personal identity will not be disclosed to Elderhostel or any other organization; my anonymity is guaranteed. Furthermore, I realize that my participation in this study is voluntary and that by signing this form I am authorizing the information I provide to be used for research purposes only. Finally, I am aware that my participation in this study will benefit Elderhostel, other senior learners, the researcher, and the academic community at large.

_____ _____

Please **sign** your name. Date

_____

Please **print** your name.

Do you wish to receive a brief summary of the major research findings?

- ☐ Yes, via surface mail
- ☐ Yes, via electronic mail: _____ (Email address)
- ☐ No

✂ --- ✂--- ✂ --- ✂ --- ✂--- ✂ --- ✂ --- ✂--- ✂ --- ✂ --- ✂--- ✂ --- ✂ --- ✂---✂

## Receive a Free Program Week with ELDERHOSTEL Canada

All individuals who return this questionnaire will have their name entered in a raffle to win an Elderhostel week, at a Canadian site of your choice, valued at a maximum of $500.00 (Canadian).

ELDERHOSTEL Canada Raffle Number: _____

## Thank you. Your participation is greatly appreciated.

## *Appendix D - The Elderhostel Canada Cover Letter*

ELDERHOSTEL Canada
4 Cataraqui Street
Kingston, Ontario K7K 1Z7
Telephone (613) 530-2222
Telefax (613) 530-2096

15 August 1997

Dear Participant:

I am writing this letter to confirm ELDERHOSTEL Canada's support for the enclosed study and to encourage you to fill out the questionnaire provided. This study is an opportunity for you to provide us with some tremendously important information about the most important group of people in our organization, the participant! It is also an opportunity for you to support the work of a doctoral student whose academic and professional interests are focused on the learning opportunities for older adults.

Over the years, ELDERHOSTEL Canada has proudly supported and encouraged graduate students whose research activities parallel our information needs as an organization. Nancy has been actively involved with our organization since 1995. The findings from her previous research have already had an impact on our offerings for you. She has provided us with new perspectives and information on what is important to hostelers when they choose an Elderhostel program and how to best meet your needs.

For over two decades, Elderhostel has been a leader in the field of adult education by providing innovative and exciting learning experiences for older adults. As we look forward to the future and embracing the rapidly growing population of older adults, we look forward to sustaining those programs that presently meet the needs of our participants and developing new offerings that will be relevant to tomorrow's community of older adult learners. To do this though, we need your input. Please take 15 minutes of your time to fill out the enclosed questionnaire and return it to Nancy as quickly as possible.

This research will truly support our mission to be " *the educational adventure where minds and experience meet.*"

Thank you in advance for your support.

Sincerely,

Dr. R.H. Williston
Executive Director

# *Appendix E - The Researcher's Cover Letter*

Mr. Miller
Street Address
City, Province/State
Postal/Zip Code
Country

Date

Dear Mr. Miller,

Learning is a part of life. Whether in a classroom, reading a book, or participating in an educational program, we spend a tremendous amount of time learning. For decades researchers have been investigating the learning needs, abilities, and interests of working young and middle aged adults, but comparatively little is known about older adult learners, people like you.

For the past three years, as part of my doctoral studies, I have been conducting research to understand the educational choices made by older adults. We know that learning does not stop in retirement. On the contrary, many retired and semi-retired people report finally having the time to learn new things that they never had time for during their working years. The range of learning interests are as vast as the number of older adult learners and therefore it is important that we learn more about you.

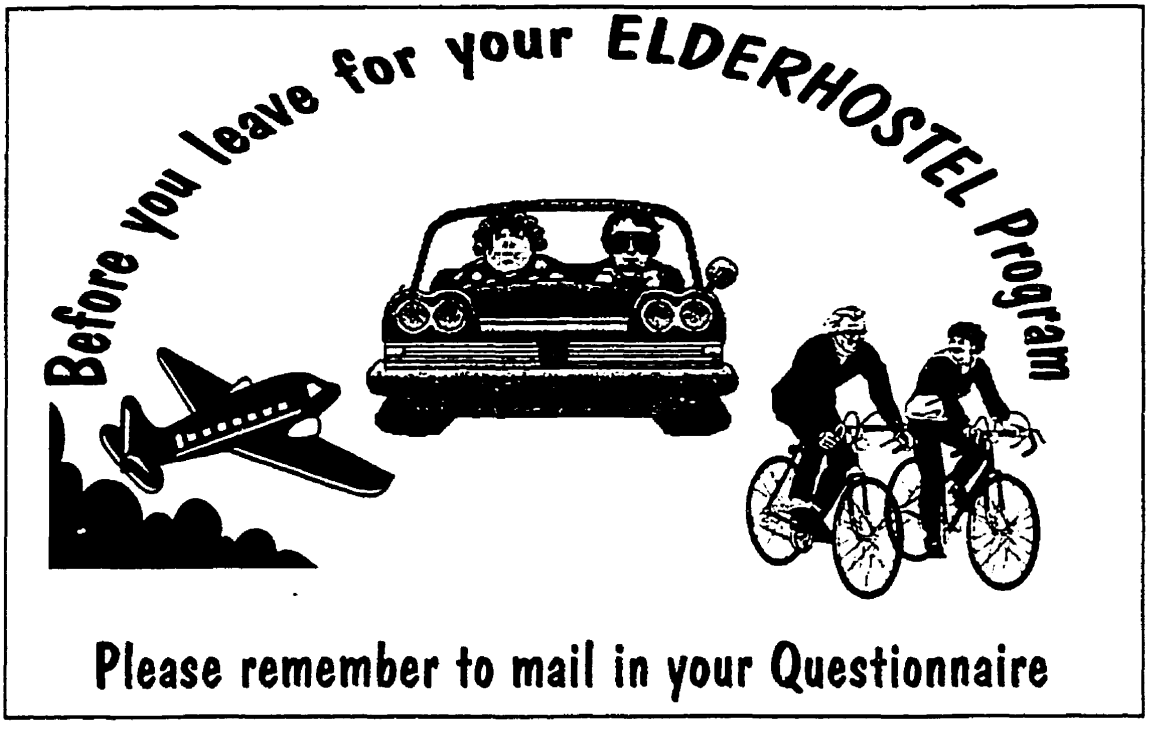
As an Elderhosteler you are obviously interested in learning and in a position to help. Enclosed you will find a questionnaire which I invite you to fill-out. It takes approximately 15 minutes, there are no right or wrong answers and you may leave blank any questions you do not wish to answer. As an incentive for filling out the survey, your name will be entered in a draw for a free ELDERHOSTEL program week (valued at a maximum of $500.00 Canadian dollars). To receive a brief summary of the major research findings, all that is required is that you indicate your interest on the gold 'Informed Consent' form which must be returned with the questionnaire.

Your participation in this study is highly valued and will provide useful information that will help Elderhostel, other senior learners, the academic community, educational programmers, and administrators. It is also an opportunity for you to help me achieve a very important, personal goal C my doctoral degree. I thank you for your kind support and look forward to receiving your questionnaire before 20 September 1997.

Yours sincerely,

Nancy Arsenault, Doctoral Candidate
McGill University, Faculty of Education

## *Appendix F - The Recall Postcard*




**A survey inquiring about your recent ELDERHOSTEL Canada registration was recently mailed to you from McGill University. If you have returned it, thank you. If not, please take 15 minutes to fill out the questionnaire and return it. Your input is valuable and important to all of us involved with this project. Thank you.**

**Nancy Arsenault**
**Phone: (514) 443-0738**
**Internet E-mail:**
**narsen@po-box.mcgill.ca**

CANADA ELDERHOSTEL

# *Appendix G - McGill Ethical Approval*

**MCGILL UNIVERSITY**
**FACULTY OF EDUCATION**

**CERTIFICATE OF ETHICAL ACCEPTABILITY FOR RESEARCH INVOLVING HUMAN SUBJECTS**

A review committee consisting of three of the following members:

| | |
|---|---|
| 1. Prof. E. Lusthaus | 1. Prof. M. Maguire |
| 2. Prof. R. Ghosh | 2. Prof. C. Mitchell |
| 3. Prof. M. Downey | 3. Prof. G. Isherwood |

has examined the application for certification of the ethical acceptability of the project titled:

***Understanding Choices: Older Adult Learners and Leisure Education***

as proposed by:

Applicant's Name *Nancy Arsenault* Supervisor's Name *Gary Anderson*

Applicant's Signature [signature] Supervisor's Signature [signature]

Degree Program *PhD - Educational Studies* Granting Agency: *Elderhostel Canada*

The review committee considers the research procedures, as explained by the applicant in this application, to be acceptable on ethical grounds.

(Signed)

a) [signature] [signature] May 3/97

b) [signature] May 7/97

c) [signature] May 8, 1997

Associate Dean (Academic) [signature] Date May 8/97

January, 1997

Research Ethics Committee of The Faculty of Education

# Appendix H - Results of the Vignette Pilot Tests

| Pilot #1: 6-Descriptions (n= 44) | | Pilot #2: 10 Descriptions (n = 74) | |
|---|---|---|---|
| IRC | Descriptions | IRC | Descriptions |
| 70.5% | You like adventure and are willing to go anywhere and try anything to enjoy new experiences in learning and socializing. You will even sacrifice the quality of the accommodations to participate in a unique or interesting program. | 50.0% | You like adventure and are willing to go anywhere and try anything to enjoy new experiences in learning and socializing. |
| | | 42.9% | You are willing to sacrifice the quality of the accommodations to participate in a unique or interesting program. |
| 72.7% | You still feel like a newcomer and are somewhat nervous about 'coming back to school'. To increase your personal comfort you look for a program that you already know something about and try not to travel too far from home. | 73.9% | You still feel like a newcomer and are somewhat nervous about 'going back to school'. |
| | | 59.7% | You prefer studying a subject that you know something about, preferably in a program located near to your home. |
| 70.5% | You enjoy physical activity, the outdoors, and avoid programs where you think most of the learning will take place sitting in a classroom. Your preference is for a program that combines learning and some form of physical activity. | 65.3% | You enjoy learning outdoors and avoid programs where you think most of the time will be spent in a classroom. |
| | | 72.8% | You prefer a program that combines learning with some form of physical activity . |
| 43.2% | You are passionate about studying a specific subject, want quality instruction at a university level, and you enjoy meeting people with a similar interest. Rather than enrol in any program, you prefer waiting until your favourite subject becomes available. | 61.4% | You are passionate about studying a favourite subject area and want quality instruction at a university level. |
| | | 50.0% | You prefer to .wait until your favourite subject becomes available rather than enrol in just any program. |
| 75.0% | You are not particularly interested in attending classes, rather, you are attracted to this program because of the affordable accommodations and convenient meal times. | 64.3% | You are not really interested in attending classes, rather, you enjoy the affordable accommodations and convenient meal times. |
| 90.9% | You love exploring and look for a program that takes you to a part of the world you have never seen to learn about the local area, history, people, or customs. | 68.6% | You love exploring and look for a program that takes you to a part of the world. |

[a] Inter-rater consistency: The % of self/partner ratings that matched +/- 1 on a 7-point Likert scale

# Appendix I - Results of the Pilot Study Factor Analysis

| DIVISION OF VARIANCE AMONG FACTORS BY VARIABLE: Oblique Rotation | | | | | | |
|---|---|---|---|---|---|---|
| # | Item | Description | Load[a] | % Var[b] | Cum %[c] | α[d] |
| 1 | 8.8 | Advise from Elderhostel site co-ordinators or hosts | 0.84 | 4.91 | 4.91 | .81 |
| | 8.7 | Advice from Elderhostel employees | 0.78 | | | |
| 2 | 9.1 | Studying a specific topic | 0.77 | 5.15 | 10.06 | .72 |
| | 8.6 | Descriptions in the Elderhostel catalogue | 0.71 | | | |
| | 9.2 | Learning something new | 0.61 | | | |
| 3 | 5.2 | A private bath or shower | 0.92 | 4.67 | 14.73 | .97 |
| | 5.1 | Private toilet | 0.87 | | | |
| 4 | 7.2 | Experiencing a different culture | 0.85 | 4.84 | 19.57 | .82 |
| | 7.3 | Satisfying my curiosity about an area | 0.80 | | | |
| | 7.7 | Exploring a particular geographic area | 0.61 | | | |
| 5 | 7.1 | Visiting with friends or family near the program site | -0.72 | 2.90 | 22.47 | -- |
| 6 | 9.11 | Finding a program that included a sports option | -0.86 | 4.53 | 27.00 | .84 |
| | 9.10 | Finding a program that involved being outdoors | -0.85 | | | |
| 7 | 9.16 | Agreeing on an Elderhostel with my travel companion | -0.90 | 4.49 | 31.49 | .77 |
| | 9.3 | Finding a shared interest with my travel companion | -0.75 | | | |
| | 4.6 | Co-ordinating dates with a travel companion | -0.72 | | | |
| 8 | 7.9 | Enjoying nearby area attractions before or after the program | 0.83 | 4.56 | 36.05 | .73 |
| | 4.12 | Combining Elderhostel with other travel plans | 0.73 | | | |
| | 7.11 | Studying at a commercial site (e.g. Lodge, YMCA) | 0.68 | | | |
| 9 | 9.8 | Finding a program that involved minimal Physical activity | 0.91 | 3.68 | 39.73 | .72 |
| | 5.6 | Accommodating a physical limitation (e.g. walking) | 0.70 | | | |
| 10 | 8.4 | Recommendations from parents | 0.90 | 4.42 | 44.15 | .64 |
| | 8.3 | Recommendations from children | 0.80 | | | |
| | 5.3 | Recreational vehicle parking at the site | 0.65 | | | |
| 11 | 4.7 | Staying home if the weather is good | 0.85 | 3.30 | 47.45 | .76 |
| | 4.8 | Travelling when the weather at home is poor | 0.77 | | | |
| 12 | 4.11 | Combining two Elderhostel programs together | -0.78 | 3.19 | 50.64 | -.57 |
| | 9.14 | The reputation of Elderhostel | 0.71 | | | |

| # | Item | Description | Load[a] | % Var[b] | Cum %[c] | α[d] |
|---|---|---|---|---|---|---|
| 13 | 5.10 | The meal description in the Elderhostel catalogue | 0.83 | 3.44 | 54.08 | .39 |
| | 5.4 | Availability of single beds | 0.70 | | | |
| 14 | 9.6 | Following a program with one learning theme | 0.79 | 3.85 | 57.93 | .56 |
| | 8.11 | A previous positive experience at this particular site | 0.66 | | | |
| 15 | 7.8 | The cost of travelling to and from the site | 0.72 | 3.49 | 61.42 | .62 |
| | 9.15 | The registration fee listed in the Elderhostel catalogue | 0.66 | | | |
| 16 | 9.4 | Studying at a beginner level | 0.69 | 3.54 | 64.94 | .41 |
| | 4.1 | Accessibility by car | 0.63 | | | |
| 17 | 6.7 | Meeting new people | 0.79 | 3.92 | 68.88 | .65 |
| | 6.1 | The social atmosphere of Elderhostel | 0.68 | | | |
| | 6.3 | Being part of a group | 0.62 | | | |
| 18 | 7.4 | Returning to a specific Elderhostel site | -0.68 | 3.92 | 72.80 | .79 |
| | 9.13 | The reputation of the site co-ordinators | -0.63 | | | |
| | 9.12 | The reputation of the specific site | -0.60 | | | |
| 19 | 6.5 | Forgetting about responsibilities at home | 0.83 | 3.32 | 76.12 | -- |
| 20 | 4.5 | Accessibility by train | 0.75 | 3.33 | 79.45 | .85 |
| | 4.3 | Accessibility by bus | 0.62 | | | |
| 21 | 9.7 | Variety in the 3 courses listed in the Elderhostel catalogue | 0.62 | 2.81 | 82.26 | -- |

[a] Factor Loading
[b] Percent of Total Variance
[c] Cumulative Variance
[d] Cronbach Alpha

**ITEMS THAT DID NOT LOAD AT ≤ 0.60**

| | | | |
|---|---|---|---|
| 4.2 | Accessibility by air plane | 6.6 | Learning with people my own age |
| 4.4 | Staying in North America | 7.6 | Enjoying a certain climate |
| 4.9 | Avoiding travel during peak tourist seasons | 7.10 | Studying at a college or university |
| 4.10 | | 8.1 | Recommendations by friends |
| 5.5 | Driving to the site in less than 6 hours | 8.2 | Recommendations by fellow Elderhostelers |
| 5.7 | Availability of double beds | 8.5 | Recommendations from other family members |
| 5.8 | Early check in/check out policies | 9.5 | |
| 5.9 | Availability of single rooms | 9.9 | Studying at an advanced level |
| 6.2 | Expanding my knowledge | | Finding a program that included educational field trips |
| 6.4 | The cost of a single room | | |
| | Being with people who share my learning interest | | |

# *Appendix J - Details of the Sample Population*

## Descriptive Age Statistics by Demographic Characteristic

| Statistic | n= | Mean | sd[a] | Median | Min. | Max | Range |
|---|---|---|---|---|---|---|---|
| Total Population | 808 | 68.4 | 6.8 | 68 | 45 | 92 | 47 |
| Male | 276 | 69.2 | 6.2 | 69 | 53 | 85 | 32 |
| Female | 532 | 68.0 | 7.0 | 68 | 45 | 92 | 47 |
| Canadian | 331 | 67.9 | 7.1 | 68 | 50 | 85 | 35 |
| American | 477 | 68.8 | 6.5 | 69 | 45 | 92 | 47 |
| New Participant | 155 | 64.3 | 6.8 | 64 | 50 | 82 | 30 |
| Return Participant | 647 | 69.4 | 6.4 | 70 | 45 | 92 | 47 |
| Attend Alone | 170 | 69.4 | 6.6 | 70 | 54 | 86 | 32 |
| Accompanied | 634 | 68.1 | 6.8 | 68 | 45 | 92 | 47 |

**[a]sd = Standard Deviation**

## Statistically Significant Chi Square Tests

Chi-Square Results for SOCIAL (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 41.98 | 16.00 | 0.00 |

Chi-Square Results for COMFORT (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 30.63 | 12.00 | 0.00 |

Chi-Square Results for PROGRAM (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 23.63 | 12.00 | 0.02 |

Chi-Square Results for ACCESS (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 42.20 | 8.00 | 0.00 |

Chi-Square Results for PREVEXP (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 36.58 | 12.00 | 0.00 |

Chi-Square Results for SINGLE (rows) by GENDER (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 41.11 | 12.00 | 0.00 |

Chi-Square Results for ACCOMPANY (rows) by GENDER (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 36.12 | 12.00 | 0.00 |

Chi-Square Results for PREVEXP (rows) by GENDER (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 21.81 | 12.00 | 0.04 |

Chi-Square Results for LOCATION (rows) by COUNTRY$ (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 81.05 | 16.00 | 0.00 |

Chi-Square Results for SINGLE (rows) by COUNTRY$ (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 40.68 | 12.00 | 0.00 |

Chi-Square Results for COST (rows) by COUNTRY$ (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 24.33 | 12.00 | 0.02 |

Chi-Square Results for ESCAPE (rows) by COUNTRY$ (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 21.40 | 8.00 | 0.01 |

Chi-Square Results for ACCESS (rows) by COUNTRY$ (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 43.94 | 8.00 | 0.00 |

Chi-Square Results for PREVEXP (rows) by COUNTRYS (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 70.17 | 12.00 | 0.00 |

Results that were Statistically Significant but of little Practical Significance

Chi-Square Results for SINGLE (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 219.38 | 12.00 | 0.00 |

Chi-Square Results for ACCOMPANY (rows) by ESCORT (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 509.13 | 12.00 | 0.00 |

Chi-Square Results for PREVEXP (rows) by ENROL (columns)

| Test statistic | Value | df | Prob |
|---|---|---|---|
| Pearson Chi-square | 55.57 | 12.00 | 0.00 |

## Perceptions of Elderhostel Programs

| CODING CATEGORY | A SYNTHESIZED LIST OF COMMENTS THAT REFLECTS THE CODING CATEGORY |
|---|---|
| All (n = 34) | • All apply. Meeting the kind of people who attend Elderhostel program is important too, as are learning about new localities and new factor.<br>• To say "check only 1" is difficult, for me, it is a combination of all 4 points.<br>• The unique thing about it is that it combines all of the above. I appreciate having my leisure to be also educational and my associates to have similar interests. Also it is something I can comfortably do alone.<br>• This question s is difficult to answer because it is all of these simultaneously.<br>• A combination of the above (3)<br>• All of the above. This will just have to fit in your computer.<br>• All of the above (n = 21)<br>• Can't check just one (2)<br>• All of the above, plus an insatiable curiosity about places and culture. |
| Location -Travel (n = 12) | • Chance to visit a specific or new territory (4)<br>• Gaining a lot of geographical and historical info, plus flora and fauna, great outdoors.<br>• To see another area, learn about it while in good company.<br>• Opportunity to visit surrounding area in a particular season.<br>• Travel experience.<br>• Travel to an area or place never before visited. |

| CODING CATEGORY | A SYNTHESIZED LIST OF COMMENTS THAT REFLECTS THE CODING CATEGORY |
|---|---|
| Educational-Travel (n = 11) | • I really think of it as an educational vacation.<br>• Educated tourism. I'd say vacation 50%, education 50%. After Malta trip this March I felt I'd missed the holiday part.<br>• A chance to combine a vacation with an education activity in a new location. |
| Leisure Education (n = 7) | • A mix of education and recreation (6).<br>• Education and mental recreation. |
| Education (n = 5) | • An educational experience the primary reason. We have found every Elderhostel program includes all of these.<br>• A chance to learn from other participants; many have more knowledge and, certainly, more experience than the average instructor. |
| Social (n = 4) | • An opportunity to meet people with same interests.<br>• Meeting alive people of similar age.<br>• To be a companion for my wife who loves to travel.<br>• To be with people of a higher than average calibre. |
| Education + Social (n = 2) | • An educational and social experience.<br>• Learning experience and to meet new friends. |
| Education, Social, + Recreation (n = 2) | • Think of it as a 3 way experience: educational, recreational and social experience.<br>• A combination of education recreation and getting to meet other people. |
| Location & Cost (n = 2) | • Affordable way to see and photograph the world and all of the above. |
| Personal Growth (n = 2) | • A personal development experience.<br>• Multifaceted individual growth. |
| Education, Vacation + Recreation (n = 2) | • Combination of an educational opportunity and recreation/vacation.<br>• Actually the wonderful combination of the first 3. |
| Other (n = 5) | • Location, class subject.<br>• So far I have combined Elderhostel with vacations and visit friends and relatives in those regions.<br>• Experience nature.<br>• A Shangri-La<br>• To escape the cold weather in the winter.<br>• Opportunity to experience an activity that's difficult to do alone. |

Note: A total of 91 participants (11.3%) provided written comments to question 1.7 in either the 'other' location or along the margin of the questionnaire.

# *Appendix K - Program Choice Details*

## Specific Program Locations

**Sites, Location, Date of Programs, Number of Participants in Survey, % of Total**

| Site Name | Location | n = | % | Start Dates |
|---|---|---|---|---|
| BRITISH COLUMBIA (21.5%) | | | | |
| Blue Water Adventures | North Vancouver | 25 | 3.08 | 06, 11, 16 Oct |
| Comox Valley Community Program | Courtenay | 47 | 5.80 | 05, 12, 19, 26 Oct |
| Lemon Creek Lodge | Slocan | 9 | 1.11 | 05, 19 Oct |
| Northwest Community College | Hazelton | 10 | 1.23 | 05 Oct |
| Northwest Educational Resources | Victoria | 65 | 8.01 | 05, 19, 26 Oct |
| Sorrento Centre | Sorrento | 5 | 0.62 | 19 Oct |
| Strathcona Outdoor Education Centre | Campbell River | 8 | 0.99 | 26 Oct; 06 Nov |
| Therah Learning Centre | Galiano Island | 5 | 0.62 | 19, 26 Oct |
| Provincial Total | | 174 | | |
| ALBERTA (22.1%) | | | | |
| Banff International Hostel | Banff | 28 | 3.45 | 26 Oct |
| Banff Y Mountain Lodge | Banff | 36 | 4.44 | 05, 14 Oct |
| Black Cat Guest Ranch | Hinton | 3 | 0.37 | 26 Oct |
| Calgary Board of Education/Elbow River | Calgary | 8 | 0.99 | 05 Oct |
| Canadian Alpine Centre & International Hostel | Banff | 1 | 0.12 | 19 Oct |
| Grant MacEwan Community College | Edmonton | 5 | 0.62 | 05 Oct |
| Jasper Park Lodge | Jasper | 78 | 9.62 | 19, 26 Oct; 09, 16, 23, 30 Nov |
| Kananaskis Inn | Kananaskis | 20 | 2.47 | 12, 26 Oct; 05 Nov |
| Provincial Total | | 179 | | |
| MANITOBA (14.2%) | | | | |
| Northern Studies Centre | Churchill | 116 | 14.2 | 9, 22 Oct; 5, 19 Nov |

| Sites, Location, Date of Programs, Number of Participants in Survey, % of Total | | | | |
|---|---|---|---|---|
| **Site Name** | **Location** | **n =** | **%** | **Start Dates** |
| ONTARIO (21.7%) | | | | |
| Algoma Highlands Conservancy | Goulais River | 1 | 0.12 | 05 Oct |
| Canadian Discoveries | Kingston | 24 | 2.96 | 16, 23 Nov |
| Centre for Ecology & Spirituality at Holy Cross | Port Burwell | 17 | 2.10 | 05 Oct |
| Conestoga College of Applied Arts & Technology | Kitchener | 35 | 4.32 | 05 Oct |
| Crieff Hills Community | Puslinch | 16 | 1.97 | 26 Oct; 28 Dec |
| Elliot Lake | Elliot | 3 | 0.37 | 05 Oct |
| Five Oaks Christian Workers' Centre | Paris | 4 | 0.49 | 02 Nov |
| Haliburton Forest & Wild Life Reserve | Haliburton | 4 | 0.49 | 16 Nov |
| Killarney Mountain Lodge | Killarney | 9 | 1.11 | 05, 12 Oct |
| Maple Sands | Haliburton | 12 | 1.48 | 19, 26 Oct; 02 Nov |
| Mount Carmel Spiritual Centre | Niagara Falls | 24 | 2.96 | 05 Oct |
| Royal Ontario Museum/Toronto | Unionville | 15 | 1.85 | 02 Nov |
| Toronto/ Lifelong Learning Canada | Unionville | 12 | 1.48 | 16, 23 Nov |
| Provincial Total | | 176 | | |
| NEW BRUNSWICK (6.3%) | | | | |
| Marathon Inn/Grand Manan | North Head | 28 | 3.45 | 05, 12 Oct |
| Marshlands Inn | Sackville | 6 | 0.74 | 19 Oct; 09 Nov |
| Shiretown Inn | St. Andrews | 10 | 1.23 | 05, 19 Oct |
| St. Martin's Country Inn | Saint John | 7 | 0.86 | 12, 19 Oct |
| Provincial Total | | 51 | | |
| NOVA SCOTIA (14.2%) | | | | |
| Amherst Shore Country Inn | Wolfville | 18 | 2.22 | 05 Oct |
| Blomindon Inn | Wolfville | 27 | 3.33 | 19, 26 Oct |
| Bluenose Lodge | Lunenburg | 23 | 2.84 | 12, 19 Oct |
| Bridgewater/Motor Inn | Bridgewater | 2 | 0.25 | 05 Oct |
| Coastal Peoples Learning Centre | Shelburne | 21 | 2.59 | 05 Oct |
| Gaelic College of Celtic Arts & Crafts | Baddeck | 4 | 0.49 | 19 Oct |
| Mountain Gap Inn | Digby | 8 | 0.99 | 05 Oct |
| Oak Island Inn | Western Shore | 10 | 1.23 | 05 Oct |
| Whitman Inn/ Kejimjujik | Caledonia | 2 | 0.25 | 19 Oct |
| Provincial Total | | 115 | | |

## 'Other' means of travel identified by Elderhostelers in Question 1.5

| WRITTEN RESPONSES PROVIDED | N=60 | PERCENT OF 'OTHER' |
|---|---|---|
| Ferry | 45 | 75.0 |
| Unsure yet | 3 | 5.0 |
| Taxi | 3 | 5.0 |
| Transit | 2 | 3.7 |
| Don't know yet | 1 | 1.7 |
| Ferry, taxi, & bus | 1 | 1.7 |
| Depends on the distance | 1 | 1.7 |
| Depends on parking facilities | 1 | 1.7 |
| Airport van | 1 | 1.7 |
| Ferry, taxi or limousine | 1 | 1.7 |
| RV with son | 1 | 1.7 |

## Combined Methods of Travel Identified by Hostelers

| | N= | & Multiple Methods | % of Total Population |
|---|---|---|---|
| Plane and Car | 69 | 30.4 | 8.5 |
| Car and Other | 30 | 13.313,3 | 3.7 |
| Plane and Bus | 29 | 12.9 | 3.6 |
| Plane and Train | 28 | 12.4 | 3.5 |
| Plane and Other | 13 | 5.8 | 1.6 |
| Train and Car | 9 | 4.0 | 1.1 |
| Train and Bus | 8 | 3.6 | 1.0 |
| Plane, Train, and Car | 8 | 3.6 | 1.0 |
| Car, Plane, and Other | 6 | 2.7 | .008 |
| Car, Plane, and Bus | 4 | 1.8 | .005 |
| Bus, Plane, and Other | 3 | 1.4 | .004 |
| Plane, Train, Bus and Car | 3 | 1.4 | .004 |
| Recreational Vehicle (RV) and Car | 3 | 1.4 | .004 |
| RV, Plane and Train | 2 | .9 | .003 |
| Bus, Plane, and Train | 2 | .9 | .003 |
| Car, Plane, Train and Other | 2 | .9 | .03 |
| Bus and Other | 2 | .9 | .03 |
| Bus, Car, Other | 2 | .9 | .03 |
| Bus, Train, Other | 1 | .5 | .02 |
| Car, Bus | 1 | .5 | .02 |
| Plane, RV | 1 | .5 | .02 |
| Total Number of People Planning to Use More than One Form of Transportation | 226 | -- | 27.9% |

## Program Companion

| PROGRAM COMPANION IDENTIFIED IN QUESTION 5.1 | N = | PERCENT |
|---|---|---|
| Spouse | 441 | 69.4 |
| Friend | 118 | 18.6 |
| Other: | 76 | 12.0 |
| ▪ Sister (20) | | |
| ▪ Spouse and Friends (20) | | |
| ▪ Other family members (8) (e.g. brother-in-law, sister-in-law) | | |
| ▪ 2 or more friends (7) | | |
| ▪ Daughter (5) | | |
| ▪ YMCA Group (5) | | |
| ▪ Significant Other (3) | | |
| ▪ Another couple (2) | | |
| ▪ Sister and friend (2) | | |
| ▪ Seeing eye dog (1) | | |
| ▪ Aunt (1) | | |
| ▪ Niece (1) | | |

# *Appendix L - Typology Factor Analyses*

## Typology: Total Population 3 Factor Loadings

| Note: Unexplained variance = 31.96% | FACTOR 1 | FACTOR 2 | FACTOR 3 |
|---|---|---|---|
| Adventurer | **0.80** | -0.15 | 0.12 |
| Geographical Guru | **0.77** | -0.24 | -0.11 |
| Activity-Oriented | **0.59** | 0.35 | 0.02 |
| Opportunist | 0.05 | **0.79** | -0.16 |
| Experimenter | -0.25 | **0.75** | 0.17 |
| Content-Committed | 0.03 | -0.01 | **0.98** |
| Eigenvalue | 1.80 | 1.25 | 1.03 |
| % of Explained Variance | 27.56 | 23.27 | 17.21 |

## Typology: Total Population 4 Factor Loadings

| Note: Unexplained variance = 18.26% | FACTOR 1 | FACTOR 2 | FACTOR 3 | FACTOR 4 |
|---|---|---|---|---|
| Geographical Guru | **0.86** | -0.11 | -0.09 | 0.04 |
| Adventurer | **0.84** | -0.05 | 0.13 | 0.14 |
| Opportunist | 0.07 | **0.88** | -0.14 | -0.01 |
| Experimenter | -0.32 | **0.73** | 0.17 | 0.07 |
| Content-Committed | 0.03 | -0.01 | **0.98** | -0.01 |
| Activity-Oriented | 0.13 | 0.04 | -0.01 | **0.99** |
| Eigenvalue | 1.80 | 1.25 | 1.03 | 0.82 |
| % of Explained Variance | 26.02 | 21.87 | 17.21 | 16.64 |

## Typology: Total Population 5 Factor Loadings

| Note: Unexplained variance = 7.97% | FACTOR 1 | FACTOR 2 | FACTOR 3 | FACTOR 4 | Factor 5 |
|---|---|---|---|---|---|
| Adventurer | **0.87** | -0.06 | 0.11 | 0.12 | -0.01 |
| Geographical Guru | **0.85** | 0.00 | -0.09 | 0.04 | -0.19 |
| Opportunist | -0.04 | **0.98** | -0.03 | 0.04 | 0.16 |
| Content-Committed | 0.02 | -0.03 | **1.00** | -0.00 | 0.03 |
| Activity-Oriented | 0.13 | 0.04 | -0.00 | **0.99** | 0.01 |
| Experimenter | -0.16 | 0.17 | 0.03 | 0.01 | **0.97** |
| Eigenvalue | 1.80 | 1.25 | 1.03 | 0.82 | 0.62 |
| % of Explained Variance | 25.19 | 16.70 | 16.84 | 16.65 | 16.65 |

## A Discussion of the Factor Analyses by Select Demographic Divisions:

A series of 3, 4, and 5-factor, factor analyses were run on eight demographic groups in the data base – men, women, American, Canadians, new participants, return participants, people planning to attend alone, and those planning to attend accompanied. The purpose of running multiple factor analyses on select sub-sets of the population based on their demographic characteristic was to determine if the typology would hold with different subsets, or if unique distinctions existed. This narrative describes the differences that emerged.

In the 3, 4, and 5-factor solutions, the Geographical Guru (GG) and Adventurer (ADV) consistently loaded on the same factor, regardless of sub-population. The Activity (AO) loaded with the GG and ADV in the 3-factor solution, but not the four or five. In the 3 and 4 factor solution with first time participants, the Experimenter (EXP) loaded in strong opposition to the GG and the ADV. The amount of explained variance for this factor, when just the GG and ADV were clustered together, ranged from a low of 24.26% with the male population subset in the 5-factor solution, to a high of 27.98% in the four factor solution for people planning to attend alone.

The CC remained a pure throughout the entire analysis, regardless of the number of factors in the solution. Only once did this item load on a factor with another item. It was in opposition in the 3-factor solution with new participants where the Opportunist (OPP) loaded positively at 0.73 and the CC loaded negatively at - 0.83. An interesting discovery if one compares the definitions of these two participant types. The amount of explained variance for this factor ranged between a low of 16.69% for first-time participants in the 5-factor solution to the highest, 17.81% for men in the 3-factor solution.

The AO sustained itself in isolation in the 4 and 5-factor solutions after being separated from the GG and ADV in the 3-factor solution. In the 3-factor solution two interesting findings emerged. First in the factor analysis with women only, the AO item did not load on any factor at a value $\leq 0.50$. Second, for new participants the AO did not load with the GG or the ADV, rather it was a factor of its own with a 0.83 factor loading. In terms of the amount of explained variance, at its best, the AO accounted for 20.93% of the explained variance with first time participants in the three factor solution, at its lowest it accounted for 16.61% of the explained variance with return participants in the 5 factor solution.

The final two types, the EXP and the OPP loaded together in the 3 and 4 factor solutions prior to loading individually in the 5 factor solution. There were however two exceptions. In the three factor solution, the EXP loaded in opposition to the GG and ADV as discussed earlier. As well, the OPP (0.73) loaded in opposition with the CC (-0.83) suggesting that the program choice influence is very different for these two types of participants. The second exception found in the four factor solution, again with the new participant. Rather than load together, the OPP created a factor of its own (0.92) and the EXP (-0.68) loaded in opposition to the GG (0.88) and the ADV (0.72).

## Typology : 3 Factor Solution by Select Demographic Characteristics

| | Explained Variance[b] | Factor 1 | Eigen 1[c] Variance | Factor 2 | Eigen 2 Variance | Factor 3 | Eigen Variance | Did not load at ≤ 0.50 |
|---|---|---|---|---|---|---|---|---|
| Total Population[a] | 68.04 | 0.80 Advent<br>0.77 Geo<br>0.59 Activity | 1.80<br>27.56 | 0.79 Oppor<br>0.75 Exper | 1.25<br>23.27 | 0.98 Content | 1.03<br>17.21 | |
| Male | 70.95 | 0.80 Advent<br>0.75 Geo<br>0.72 Activity | 1.88<br>28.93 | 0.82 Exper<br>0.80 Oppor | 1.35<br>24.21 | -0.96 Content | 1.03<br>17.81 | |
| Female | 66.98 | 0.82 Advent<br>0.91 Geo | 1.81<br>28.18 | 0.80 Oppor<br>0.68 Exper | 1.20<br>21.79 | 0.99 Content | 1.01 | 0.45 Activity (f1)<br>0.42 Activity (f2) |
| Canadian | 69.34 | 0.82 Advent<br>0.80 Geo<br>0.63 Activity | 1.95<br>29.30 | 0.79 Oppor<br>0.77 Exper | 1.22<br>23.16 | 0.98 Content | 1.00<br>16.88 | |
| American | 67.29 | 0.80 Advent<br>0.78 Geo<br>0.54 Activity | 1.68<br>26.34 | 0.80 Oppor<br>0.77 Exper | 1.31<br>23.57 | 0.97 Content | 1.04<br>17.38 | |
| First Time Participant | 70.24 | 0.82 Geo<br>-0.81 Exper<br>0.60 Advent | 1.93<br>28.54 | -0.83 Content<br>0.73 Oppor | 1.25<br>20.77 | 0.83 Activity | 1.04<br>20.93 | |
| Return Participant | 67.82 | 0.79 Advent<br>0.78 Geo<br>0.60 Activity | 1.80<br>27.10 | 0.81 Oppor<br>0.77 Exper | 1.25<br>23.61 | -0.98 Content | 1.02<br>17.11 | |
| Attend Alone | 68.61 | 0.86 Advent<br>0.82 Geo | 1.83<br>28.96 | 0.78 Oppor<br>0.75 Exper | 1.34<br>22.48 | -0.98 Content | 0.94*<br>17.17 | 0.48 Activity (f1) |
| Attend Accompanied | 68.01 | 0.79 Advent<br>0.76 Geo<br>0.60 Activity | 1.80<br>27.24 | 0.82 Oppor<br>0.75 Exper | 1.25<br>23.44 | 0.97 Content | 1.02<br>17.33 | |

[a] Total population, n = 777 cases, 34 were excluded from the analysis due to missing data.

[b] Total explained variance

[c] Top number in the cell is the Eigenvalue, the number below is the percentage of explained variance

## Typology : 4 Factor Solution by Select Demographic Characteristics

| | Total Variance[b] | Factor 1 | Eigen 1[c] Var | Factor 2 | Eigen 2 Var | Factor 3 | Eigen 3 Var | Factor 4 | Eigen 4 Var |
|---|---|---|---|---|---|---|---|---|---|
| Total Population[a] | 81.74 | 0.86 Geo<br>0.84 Adv | 1.80<br>26.02 | 0.88 Opp<br>0.73 Exp | 1.25<br>21.87 | 0.98 Con | 1.03<br>17.21 | 0.99 Act | 0.82<br>16.64 |
| Male | 82.73 | 0.92 Geo<br>0.73 Adv | 1.88<br>24.28 | 0.85 Opp<br>0.80 Exp | 1.35<br>23.13 | -0.96 Con | 1.03<br>17.82 | 0.96 Act | 0.71<br>17.50 |
| Female | 81.82 | 0.85 Adv<br>0.85 Geo | 1.81<br>26.91 | 0.89 Opp<br>0.69 Exp | 1.20<br>21.27 | 0.99 Con | 1.01<br>17.00 | 0.99 Act | 0.89<br>16.64 |
| Canadian | 82.79 | 0.88 Adv<br>0.86 Geo | 1.95<br>27.61 | 0.87 Opp<br>0.72 Exp | 1.22<br>21.79 | 0.99 Con | 1.00<br>16.84 | 0.98 Act | 0.81<br>16.55 |
| American | 81.38 | 0.87 Geo<br>0.81 Adv | 1.68<br>24.69 | 0.85 Opp<br>0.78 Exp | 1.31<br>25.58 | -0.98 Con | 1.04<br>17.35 | 0.99 Act | 0.85<br>16.76 |
| First Time Participant | 83.03 | 0.88 Geo<br>0.72 Adv<br>-0.68 Exp | 1.93<br>29.58 | 0.93 Con | 1.25<br>17.43 | 0.97 Act | 1.04<br>17.90 | 0.92 Opp | 0.77<br>18.12 |
| Return Participant | 81.69 | 0.85 Geo<br>0.85 Adv | 1.80<br>25.52 | 0.87 Opp<br>0.76 Exp | 1.25<br>22.45 | 0.98 Con | 1.02<br>17.12 | 0.99 Act | 0.83<br>16.60 |
| Attend Alone | 82.75 | 0.87 Geo<br>0.85 Adv | 1.83<br>27.98 | 0.88 Opp<br>0.68 Exp | 1.34<br>21.15 | 0.99 Con | 0.94<br>16.88 | 0.97 Act | 0.85<br>16.74 |
| Attend with Companion | 81.54 | 0.86 Geo<br>0.83 Adv | 1.80<br>25.48 | 0.88 Opp<br>0.73 Exp | 1.25<br>22.12 | 0.98 Con | 1.02<br>17.28 | 0.99 Act | 0.81<br>16.66 |

[a] Total population, n = 777 cases, 34 were excluded from the analysis due to missing data.

[b] Total explained variance

[c] Top number in the cell is the Eigenvalue, the number below is the percentage of explained variance

## Typology : 5 Factor Solution by Select Demographic Characteristics

| | Total Var[b] | Factor 1 | Eigen 1[c] Var | Factor 2 | Eigen 2 Var | Factor 3 | Eigen 3 Var | Factor 4 | Eigen 4 Var | Factor 5 | Eigen 5 Var |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Population[a] | 92.03 | 0.87 Adv<br>0.85 Geo | 1.80<br>25.19 | 0.98 Opp | 1.25<br>16.70 | 1.00 Con | 1.03<br>16.84 | 0.99 Act | 0.82<br>16.65 | 0.97 Exp | 0.82<br>16.65 |
| Male | 92.03 | 0.92 Geo<br>0.75 Adv | 1.88<br>24.26 | 0.97 Opp | 1.35<br>16.79 | 0.99 Con | 1.03<br>16.94 | 0.97 Act | 0.71<br>17.40 | 0.97 Exp | 0.86<br>16.64 |
| Female | 92.93 | 0.90 Adv<br>0.82 Geo | 1.81<br>25.25 | 0.99 Opp | 1.20<br>16.71 | 1.00 Con | 1.01<br>16.86 | 1.00 Act | 0.89<br>16.65 | 0.96 Exp | 0.86<br>16.85 |
| Canadian | 93.32 | 0.89 Adv<br>0.87 Geo | 1.95<br>26.75 | 0.98 Opp | 1.22<br>16.73 | 1.00 Con | 1.00<br>16.67 | 0.99 Act | 0.81<br>16.58 | -0.97 Exp | 0.83<br>16.59 |
| American | 91.60 | 0.89 Geo<br>0.80 Adv | 1.68<br>24.33 | 0.98 Opp | 1.31<br>16.69 | -0.98 Con | 1.04<br>17.15 | 0.99 Act | 0.85<br>16.77 | 0.97 Exp | 0.81<br>16.66 |
| First Time Participant | 93.32 | 0.90 Adv<br>0.79 Geo | 1.93<br>24.89 | 0.99 Con | 1.25<br>16.69 | 0.98 Act | 1.04<br>16.63 | 0.98 Opp | 0.77<br>16.76 | 0.96 Exp | 0.82<br>18.05 |
| Return Participant | 81.89 | 0.86 Geo<br>0.85 Adv | 1.80<br>25.14 | 0.98 Opp | 1.25<br>16.70 | 0.99 Con | 1.02<br>16.92 | 0.99 Act | 0.83<br>16.61 | 0.97 Exp | 0.81<br>16.52 |
| Attend Alone | 93.92 | 0.92 Adv<br>0.83 Geo | 1.83<br>26.13 | 0.99 Opp | 1.34<br>16.70 | -0.99 Con | 0.94<br>16.88 | 0.99 Act | 0.85<br>16.66 | 0.96 Exp | 0.87<br>17.55 |
| Attend with Companion | 91.52 | 0.86 Geo<br>0.83 Adv | 1.80<br>24.81 | 0.98 Opp | 1.25<br>16.71 | 0.99 Con | 1.02<br>16.85 | 0.99 Act | 0.81<br>16.66 | 0.97 Exp | 0.80<br>16.49 |

[a] Total population, n = 777 cases, 34 were excluded from the analysis due to missing data.

[b] Total explained variance

[c] Top number in the cell is the Eigenvalue, the number below is the percentage of explained variance

## Typology Allocation by Demographic Characteristic by Percent

| Code | % | Total[a] | Women | Men | Canada | USA | New | Return | Alone | Accompanied |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Explorer | 21 | 24 | 15 | 16 | 25 | 18 | 22 | 26 | 20 |
| 2 | Activity-Oriented | 32 | 31 | 35 | 33 | 32 | 35 | 32 | 24 | 34 |
| 3 | Content-Committed | 7 | 8 | 7 | 10 | 6 | 6 | 8 | 14 | 6 |
| 4 | Convenience-Oriented | 2 | 2 | 3 | 4 | 1 | 6 | 1 | 4 | 2 |
| 5 | Opportunist | 1 | 1 | 2 | 1 | 2 | 2 | 1 | -- | 2 |
| 6 | Explorer/Activity-Oriented | 11 | 10 | 13 | 12 | 11 | 11 | 11 | 13 | 11 |
| 7 | Explorer/Content-Committed | 2 | 2 | 2 | 2 | 2 | 1 | 2 | 4 | 2 |
| 8 | Explorer/Convenience-Oriented | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| 9 | Explorer/Opportunist | 1 | 1 | 1 | -- | 1 | 1 | 1 | 1 | -- |
| 10 | Activity-Oriented/Content-Committed | 4 | 3 | 4 | 5 | 2 | 1 | 4 | 3 | 4 |
| 11 | Activity-Oriented/Convenience-Oriented | 1 | 1 | 1 | 2 | 1 | 3 | 1 | -- | 1 |
| 12 | Activity-Oriented/Experimenter | 1 | 1 | 2 | 2 | 1 | 3 | 1 | 1 | 2 |
| 13 | Content-Committed/Convenience-Oriented | 1 | 1 | -- | 1 | -- | -- | 1 | -- | -- |
| 14 | Content-Committed/Opportunist | 1 | -- | -- | -- | -- | 1 | -- | -- | -- |
| 15 | Convenience-Oriented/ | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| 16 | Mix of 3 or More | 2 | 2 | 3 | 2 | 2 | 2 | 2 | 3 | 2 |
| 17 | Do not fit typology | 13 | 13 | 12 | 10 | 14 | 10 | 13 | 7 | 14 |

[a] Percent of the Total Fall 1997 Sample Population

# *Appendix M - Categorizing Participants into the Typology*

**Participant Coding Matrix**

| Coding Scheme | Explorer | Activity-Oriented | Content-Committed | Experimenter | Opportunist |
|---|---|---|---|---|---|
| Explorer | 1 | -- | -- | -- | -- |
| Activity-Oriented | 6 | 2 | -- | -- | -- |
| Content-Committed | 7 | 10 | 3 | -- | -- |
| Experimenter | 8 | 11 | 13 | 4 | -- |
| Opportunist | 9 | 12 | 14 | 15 | 5 |
| #16 = people who identify with 3 or more participant types<br>#17 = people who do not identify with any of the participant types | | | | | |

Categorization Rules:

1. To be assigned to the table, a participant had to have indicated a 4 or 5 on a 5-point Likert scale. It was decided that if a participant indicated a 1, 2, or 3 he or she did not feel the vignette adequately described them.
2. To be assigned to a 'pure' category (# 1, 2, 3, 4, or 5) all participants who had one single highest score were placed in that category (Examples 1 - 3 below).
3. Participants who indicated, as their highest score, two 4s or two 5s were assigned to a 'blended category; #'s 6 though 15 (Examples 4 -6 below).
4. Participants who indicated, as their highest score, three 4s or 5s were coded as #16 meaning that they identified with the descriptions but could not be assigned (Example 7 below).
5. Participants who did not have a single score of 4 or 5 were coded as #17. This group represents the 'unknown' portion of the explained variance for, by virtue of their Likert responses, did not feel any of the vignettes adequately described them (Example 8 below).

| Example | 1:Explorer | 2:Activity-Oriented | 3:Content-Committed | 4:Experimenter | 5:Opportunist | Type |
|---|---|---|---|---|---|---|
| 1 | 5 | 3 | 4 | 1 | 2 | 1 |
| 2 | 3 | 5 | 2 | 3 | 2 | 2 |
| 3 | 2 | 1 | 4 | 1 | 2 | 3 |
| 4 | 5 | 1 | 5 | 2 | 1 | 7 |
| 5 | 4 | 3 | 1 | 1 | 4 | 9 |
| 6 | 2.5 | 5 | 3 | 5 | 1 | 11 |
| 7 | 4 | 4 | 2 | 4 | 4 | 16 |
| 8 | 2 | 1 | 3 | 2 | 1 | 17 |

# *Appendix N - Factors Influencing Program Choice*

## Descriptive Statistics from the 52 Likert Items in the Original Data Base

| Item | FA[a] | Description | % N/A[b] | Mean | n = |
|---|---|---|---|---|---|
| 3.52 | | A previous positive Elderhostel Canada experience | 42.8 | 3.5 | 781 |
| 3.51 | | The cost of single rooms | 34.7 | 2.3 | 790 |
| 3.34 | | Accommodating a sensory limitation (e.g. hearing) | 33.8 | 1.5 | 797 |
| 3.43 | | A previous positive experience at a site | 33.5 | 2.9 | 790 |
| 3.49 | | Word of mouth recommendation | 31.2 | 3.0 | 789 |
| 3.2 | | Co-ordinating dates with a travel companion | 29.4 | 3.6 | 793 |
| 3.35 | | Attending 2 or more Elderhostel programs 'back to back' | 26.5 | 1.7 | 790 |
| 3.9 | | Returning to a specific site | 25.4 | 2.6 | 791 |
| 3.41 | * | The bed size | 23.6 | 2.6 | 741 |
| 3.36 | * | Visiting family or friends in the local area | 22.8 | 2.1 | 795 |
| 3.42 | | The Canadian dollar exchange rate | 22.5 | 2.2 | 790 |
| 3.22 | | Accommodating a physical limitation ( walking) | 22.3 | 2.0 | 798 |
| 3.37 | | Availability of single rooms | 20.7 | 2.4 | 798 |
| 3.23 | * | Accessibility by bus or train | 20.3 | 2.1 | 794 |
| 3.18 | | Agreeing on an Elderhostel with my travel companion | 19.8 | 4.2 | 798 |
| 3.39 | | Advice from Elderhostel site co-ordinators or employees | 19.4 | 2.9 | 778 |
| 3.6 | | Forgetting personal worries | 17.9 | 2.1 | 799 |
| 3.19 | | Forgetting responsibilities at home | 17.3 | 2.2 | 797 |
| 3.14 | | Driving to the site in less than 6 hours | 16.6 | 1.9 | 799 |
| 3.47 | * | The reputation of the Elderhostel site | 16.2 | 3.9 | 784 |
| 3.33 | | Taking a holiday before or after Elderhostel | 16.2 | 2.5 | 795 |
| 3.8 | | Finding a shared interest with my travel companion | 16.1 | 4.0 | 797 |
| 3.4 | * | Studying at a college or university | 15.3 | 2.2 | 792 |
| 3.29 | | Finding a program with a sports option | 14.7 | 1.8 | 795 |
| 3.3 | | Accessibility by airplane | 13.8 | 2.6 | 792 |
| 3.15 | | Experiencing a different culture | 13.2 | 3.3 | 797 |
| 3.4 | * | A choice of 3 different courses at one site | 12.9 | 2.7 | 758 |
| 3.12 | | Accessibility by car | 11.3 | 2.9 | 798 |
| 3.27 | | Availability of single beds | 10.4 | 2.7 | 799 |

| | | | | | |
|---|---|---|---|---|---|
| 3.16 | | Following a program with one learning theme | 9.7 | 2.4 | 797 |
| **Item** | **FA[a]** | **Description** | **% N/A[b]** | **Mean** | **n =** |
| 3.11 | | Studying at a commercial site (e.g. hotel, lodge) | 9.7 | 2.4 | 796 |
| 3.17 | | Seeking a high level of physical activity | 9.1 | 2.2 | 795 |
| 3.13 | * | Enjoying a certain climate | 7.4 | 2.9 | 798 |
| 3.5 | | Finding a program with minimal physical activity | 5.8 | 1.9 | 797 |
| 3.38 | | The cost of travelling to and from the site | 5.7 | 2.8 | 801 |
| 3.21 | | Being part of a group | 5.6 | 3.0 | 798 |
| 3.26 | * | Having a change from my daily routine | 5.3 | 3.4 | 804 |
| 3.1 | | Finding a program that included educational field trips | 5.1 | 3.7 | 798 |
| 3.2 | | Finding a program that involved being outdoors | 5 | 3.3 | 803 |
| 3.48 | | The program registration fee | 4.9 | 3.0 | 796 |
| 3.5 | | Private toilet facilities | 4.5 | 3.8 | 801 |
| 3.44 | | Private bath/shower facilities | 4.1 | 3.7 | 801 |
| 3.24 | | Satisfying a curiosity about a geographical area | 3.9 | 3.9 | 797 |
| 3.1 | | Studying a specific topic | 3.6 | 3.5 | 800 |
| 3.45 | | The reputation of Elderhostel | 3.3 | 4.3 | 795 |
| 3.28 | * | Exploring a particular geographic area | 3 | 3.8 | 797 |
| 3.25 | | Learning with people my own age | 3 | 3.0 | 805 |
| 3.7 | | Being with people who share my learning interest | 1.5 | 3.6 | 798 |
| 3.31 | | Meeting new people | 1.1 | 3.6 | 802 |
| 3.46 | | Descriptions in the Elderhostel catalogue | 1 | 4.3 | 800 |
| 3.3 | | Expanding my knowledge | 0.5 | 4.2 | 802 |
| 3.32 | | Learning something new | 0.1 | 4.4 | 797 |

[a] Items with a * did not load at ≤ 0.50 in a factor analysis

[b] Percent of people who indicated that this item was Not applicable to this particular program choice.

## Factor Analysis Results

Program Choice Factor Loadings Final Results 3 Jan 98 database: Lkt6to1 Rotated Loading Matrix (VARIMAX, Gamma = 1.0000) 601 Cases (74.1%), 210 (25.9%) rejected due to missing data

| | Comfort | Location | Companion | Activity | Social |
|---|---|---|---|---|---|
| Q350TOILET | 0.83 | 0.04 | 0.15 | -0.07 | 0.00 |
| Q344BTHSHW | 0.83 | 0.06 | 0.14 | -0.09 | 0.00 |
| Q311HOTEL | 0.55 | 0.02 | 0.05 | 0.02 | 0.17 |
| Q328AREA | 0.02 | 0.81 | 0.03 | 0.13 | 0.08 |
| Q324CURIOUS | 0.05 | 0.81 | 0.01 | 0.10 | 0.08 |
| Q315CULTURE | 0.13 | 0.53 | -0.02 | 0.14 | 0.10 |
| Q310TRIPS | 0.04 | 0.52 | 0.09 | 0.28 | 0.25 |
| Q318AGREE | 0.17 | 0.06 | 0.82 | 0.01 | -0.03 |
| Q320COORD | 0.06 | -0.01 | 0.80 | 0.09 | 0.06 |
| Q38SHINTST | 0.13 | 0.08 | 0.80 | -0.01 | 0.08 |
| Q317PYSACT | -0.05 | 0.15 | 0.02 | 0.80 | 0.04 |
| Q329SPORTS | -0.01 | 0.03 | 0.06 | 0.70 | 0.02 |
| Q32OUTDOOR | -0.10 | 0.28 | 0.04 | 0.67 | 0.13 |
| Q321GROUP | 0.02 | 0.04 | 0.07 | 0.09 | 0.78 |
| Q331MEETNEW | -0.00 | 0.15 | 0.01 | -0.03 | 0.72 |
| Q325OWNAGE | 0.16 | 0.14 | -0.09 | 0.01 | 0.69 |
| Q37SHLEARN | -0.05 | 0.08 | 0.08 | 0.06 | 0.69 |
| Q36WORRY | 0.05 | -0.02 | -0.03 | 0.03 | 0.12 |
| Q319FORGET | 0.05 | 0.04 | 0.10 | 0.08 | 0.13 |
| Q316ONETHM | 0.12 | -0.12 | -0.09 | 0.12 | 0.14 |
| Q31TOPIC | -0.15 | 0.11 | -0.02 | -0.03 | -0.02 |
| Q33EXPAND | -0.17 | 0.36 | 0.10 | -0.25 | 0.14 |
| Q345EHREP | 0.04 | 0.12 | 0.00 | -0.04 | 0.17 |
| Q346CATALOG | 0.11 | 0.13 | 0.07 | -0.03 | 0.15 |
| Q338COST | -0.03 | 0.04 | 0.01 | 0.04 | 0.03 |
| Q348PROGFEE | 0.04 | 0.09 | 0.07 | 0.08 | 0.00 |
| Q342XRATE | 0.12 | 0.00 | -0.06 | -0.01 | 0.06 |
| Q343PREVEXP | 0.13 | 0.06 | -0.01 | -0.01 | 0.06 |
| Q352PREVEHC | -0.09 | -0.09 | -0.08 | 0.05 | 0.05 |
| Q39RTNSITE | 0.20 | -0.01 | 0.09 | 0.00 | 0.12 |
| Q322DISABLE | 0.10 | 0.03 | 0.01 | -0.13 | 0.06 |
| Q35MINACT | 0.15 | -0.08 | -0.05 | -0.24 | 0.00 |
| Q334SENSORY | 0.02 | 0.05 | 0.06 | 0.05 | 0.08 |
| Q336FAMILY | -0.05 | -0.05 | 0.13 | 0.03 | 0.07 |
| Q333HOLIDAY | 0.17 | 0.16 | 0.12 | -0.02 | 0.08 |
| Q339ADVICE | 0.09 | 0.07 | 0.02 | 0.13 | 0.13 |
| Q349WRDMTH | 0.05 | 0.01 | 0.14 | 0.19 | 0.05 |
| Q312CAR | 0.31 | -0.07 | 0.14 | 0.06 | 0.10 |
| Q314CLOSE | 0.15 | -0.19 | -0.08 | 0.11 | 0.10 |
| Q330PLANE | 0.12 | 0.15 | -0.00 | 0.05 | 0.09 |
| Q351SGCOST | 0.01 | -0.01 | -0.14 | 0.05 | 0.02 |
| Q327SGBED | 0.01 | -0.10 | -0.14 | -0.01 | 0.09 |
| Q337SGROOM | 0.25 | 0.03 | -0.17 | 0.01 | 0.07 |
| Q323BUS | 0.01 | -0.06 | -0.07 | -0.14 | 0.06 |
| Q34UNIV | 0.17 | -0.02 | -0.00 | 0.10 | 0.10 |
| Q347SITE | 0.25 | -0.08 | 0.11 | 0.08 | 0.13 |
| Q313CLIMATE | 0.30 | 0.10 | 0.06 | 0.20 | 0.03 |
| Q332LRNNEW | -0.10 | 0.41 | 0.12 | -0.35 | 0.23 |
| Q340CRSES3 | 0.10 | 0.22 | 0.01 | -0.14 | 0.11 |
| Q341BEDSZ | 0.40 | 0.02 | 0.10 | -0.06 | 0.07 |
| Q326CHANGE | 0.14 | -0.03 | 0.06 | 0.05 | 0.4 |
| Q335ATTEND2 | 0.00 | 0.02 | -0.12 | -0.05 | 0.06 |

Program Choice Factor Loadings Final Results 3 Jan 98 database: Lkt6to1 Rotated Loading Matrix (VARIMAX, Gamma = 1.0000) 601 Cases (74.1%), 210 (25.9%) rejected due to missing data

| | Escape | Program | Organizational Attributes | Cost | Previous Experience |
|---|---|---|---|---|---|
| Q350TOILET | 0.01 | -0.02 | 0.11 | -0.04 | 0.06 |
| Q344BTHSHW | 0.01 | -0.02 | 0.16 | -0.04 | 0.06 |
| Q311HOTEL | 0.17 | 0.08 | -0.05 | 0.19 | 0.12 |
| Q328AREA | 0.01 | -0.04 | 0.03 | 0.06 | -0.03 |
| Q324CURIOUS | 0.01 | -0.07 | 0.15 | 0.08 | 0.03 |
| Q315CULTURE | 0.07 | 0.25 | -0.03 | -0.09 | -0.05 |
| Q310TRIPS | -0.09 | 0.13 | 0.14 | 0.12 | -0.00 |
| Q318AGREE | 0.01 | -0.03 | 0.04 | -0.01 | -0.05 |
| Q320COORD | 0.02 | -0.01 | 0.07 | 0.03 | 0.01 |
| Q38SHINTST | 0.07 | -0.02 | -0.02 | 0.03 | 0.02 |
| Q317PYSACT | 0.04 | 0.10 | -0.04 | 0.03 | -0.01 |
| Q329SPORTS | 0.09 | -0.01 | -0.06 | -0.04 | 0.06 |
| Q32OUTDOOR | 0.01 | -0.02 | 0.06 | 0.14 | -0.03 |
| Q321GROUP | -0.00 | 0.07 | -0.03 | 0.11 | -0.01 |
| Q331MEETNEW | 0.07 | 0.08 | 0.20 | -0.01 | 0.01 |
| Q325OWNAGE | 0.10 | -0.02 | 0.06 | -0.01 | 0.14 |
| Q37SHLEARN | 0.14 | 0.21 | 0.12 | -0.01 | 0.08 |
| Q36WORRY | 0.84 | 0.05 | 0.02 | 0.09 | 0.10 |
| Q319FORGET | 0.83 | 0.05 | -0.03 | 0.13 | 0.13 |
| Q316ONETHM | -0.05 | 0.70 | 0.04 | 0.03 | 0.03 |
| Q31TOPIC | 0.03 | 0.67 | 0.14 | 0.05 | 0.14 |
| Q33EXPAND | 0.02 | 0.57 | 0.06 | -0.09 | 0.03 |
| Q345EHREP | 0.01 | 0.05 | 0.79 | 0.01 | 0.03 |
| Q346CATALOG | 0.00 | 0.12 | 0.77 | 0.11 | 0.02 |
| Q338COST | 0.07 | 0.00 | 0.05 | 0.76 | -0.05 |
| Q348PROGFEE | 0.09 | 0.01 | 0.14 | 0.70 | 0.08 |
| Q342XRATE | 0.10 | 0.07 | -0.10 | 0.66 | 0.16 |
| Q343PREVEXP | 0.08 | 0.17 | 0.03 | 0.09 | 0.71 |
| Q352PREVEHC | 0.05 | -0.05 | 0.22 | 0.02 | 0.69 |
| Q39RTNSITE | 0.14 | 0.05 | -0.23 | 0.05 | 0.56 |
| Q322DISABLE | 0.07 | 0.01 | 0.03 | 0.07 | 0.07 |
| Q35MINACT | 0.15 | 0.17 | 0.03 | 0.14 | -0.03 |
| Q334SENSORY | 0.00 | -0.01 | -0.02 | -0.05 | 0.12 |
| Q336FAMILY | -0.04 | -0.07 | 0.04 | 0.11 | 0.16 |
| Q333HOLIDAY | 0.10 | 0.03 | 0.04 | 0.02 | 0.09 |
| Q339ADVICE | -0.04 | 0.04 | 0.14 | 0.25 | 0.05 |
| Q349WRDMTH | 0.14 | 0.02 | 0.11 | 0.07 | 0.04 |
| Q312CAR | 0.02 | -0.02 | -0.02 | 0.12 | 0.06 |
| Q314CLOSE | 0.17 | 0.13 | 0.06 | 0.14 | 0.15 |
| Q330PLANE | 0.01 | 0.12 | 0.11 | 0.12 | -0.10 |
| Q351SGCOST | 0.06 | 0.06 | 0.04 | 0.29 | 0.07 |
| Q327SGBED | 0.08 | 0.03 | -0.05 | -0.03 | -0.00 |
| Q337SGROOM | -0.04 | 0.06 | -0.00 | 0.10 | 0.06 |
| Q323BUS | 0.11 | 0.07 | 0.14 | 0.07 | 0.23 |
| Q34UNIV | 0.10 | 0.48 | -0.04 | 0.06 | -0.02 |
| Q347SITE | 0.10 | 0.02 | 0.41 | -0.02 | 0.25 |
| Q313CLIMATE | 0.10 | 0.02 | 0.15 | 0.16 | -0.16 |
| Q332LRNNEW | -0.02 | 0.34 | 0.14 | -0.07 | -0.05 |
| Q340CRSES3 | 0.08 | -0.22 | -0.02 | 0.13 | 0.14 |
| Q341BEDSZ | 0.03 | -0.07 | -0.13 | 0.27 | -0.03 |
| Q326CHANGE | 0.47 | -0.13 | 0.09 | 0.05 | 0.03 |
| Q335ATTEND2 | 0.12 | 0.15 | 0.12 | -0.01 | 0.02 |

Program Choice Factor Loadings Final Results 3 Jan 98 database: Lkt6to1 Rotated Loading Matrix (VARIMAX, Gamma = 1.0000) 601 Cases (74.1%), 210 (25.9%) rejected due to missing data

| | Limitations | Travel | Information | Accessibility | Attend Alone |
|---|---|---|---|---|---|
| Q350TOILET | 0.10 | 0.01 | 0.13 | 0.09 | 0.13 |
| Q344BTHSHW | 0.08 | 0.02 | 0.12 | 0.11 | 0.13 |
| Q311HOTEL | 0.14 | 0.16 | 0.01 | 0.08 | -0.00 |
| Q328AREA | -0.06 | 0.08 | -0.11 | -0.04 | -0.01 |
| Q324CURIOUS | 0.07 | 0.02 | 0.01 | -0.20 | -0.01 |
| Q315CULTURE | 0.06 | 0.16 | 0.30 | -0.06 | -0.09 |
| Q310TRIPS | 0.04 | -0.06 | 0.12 | -0.02 | -0.15 |
| Q318AGREE | -0.04 | 0.06 | 0.03 | 0.08 | -0.30 |
| Q320COORD | 0.08 | 0.07 | 0.12 | 0.04 | 0.01 |
| Q38SHINTST | -0.02 | 0.06 | 0.01 | -0.03 | -0.31 |
| Q317PYSACT | -0.17 | 0.01 | 0.08 | 0.01 | -0.07 |
| Q329SPORTS | 0.00 | 0.13 | 0.16 | 0.13 | 0.13 |
| Q32OUTDOOR | -0.14 | -0.18 | -0.01 | -0.02 | -0.06 |
| Q321GROUP | 0.10 | 0.04 | 0.07 | 0.07 | 0.10 |
| Q331MEETNEW | -0.03 | 0.08 | 0.13 | 0.03 | 0.07 |
| Q325OWNAGE | 0.07 | 0.12 | 0.03 | 0.02 | 0.02 |
| Q37SHLEARN | 0.05 | -0.04 | 0.07 | 0.00 | 0.03 |
| Q36WORRY | 0.13 | 0.06 | 0.10 | 0.09 | 0.09 |
| Q319FORGET | 0.08 | 0.05 | 0.11 | 0.00 | 0.05 |
| Q316ONETHM | 0.07 | 0.05 | 0.02 | -0.14 | -0.01 |
| Q31TOPIC | 0.01 | -0.08 | -0.15 | 0.08 | 0.06 |
| Q33EXPAND | -0.10 | -0.12 | 0.12 | 0.19 | 0.11 |
| Q345EHREP | 0.03 | 0.06 | 0.11 | -0.00 | -0.01 |
| Q346CATALOG | -0.01 | 0.10 | 0.07 | 0.01 | 0.01 |
| Q338COST | 0.03 | 0.02 | 0.07 | 0.10 | 0.26 |
| Q348PROGFEE | 0.08 | 0.00 | 0.08 | 0.10 | 0.16 |
| Q342XRATE | 0.02 | 0.20 | 0.23 | -0.09 | -0.12 |
| Q343PREVEXP | 0.05 | 0.09 | 0.16 | 0.01 | 0.04 |
| Q352PREVEHC | 0.07 | 0.03 | -0.02 | 0.17 | 0.06 |
| Q39RTNSITE | 0.10 | 0.16 | 0.00 | 0.03 | 0.09 |
| Q322DISABLE | 0.82 | 0.04 | 0.07 | 0.04 | 0.06 |
| Q35MINACT | 0.72 | 0.11 | -0.01 | 0.00 | 0.06 |
| Q334SENSORY | 0.65 | 0.08 | 0.16 | 0.05 | 0.09 |
| Q336FAMILY | 0.12 | 0.71 | -0.01 | -0.01 | 0.08 |
| Q333HOLIDAY | 0.03 | 0.70 | 0.08 | -0.03 | -0.11 |
| Q339ADVICE | 0.12 | -0.01 | 0.68 | -0.01 | 0.09 |
| Q349WRDMTH | 0.17 | 0.10 | 0.64 | -0.06 | 0.03 |
| Q312CAR | 0.06 | 0.07 | 0.01 | 0.73 | -0.12 |
| Q314CLOSE | 0.14 | -0.05 | -0.00 | 0.60 | 0.16 |
| Q330PLANE | 0.07 | 0.15 | 0.10 | -0.50 | 0.30 |
| Q351SGCOST | 0.07 | 0.00 | 0.13 | -0.04 | 0.73 |
| Q327SGBED | 0.04 | 0.01 | -0.05 | 0.07 | 0.72 |
| Q337SGROOM | 0.05 | -0.09 | -0.00 | -0.06 | 0.68 |
| Q323BUS | 0.13 | 0.21 | 0.13 | -0.21 | 0.44 |
| Q34UNIV | 0.16 | 0.23 | 0.14 | -0.06 | 0.13 |
| Q347SITE | -0.01 | 0.05 | 0.44 | -0.15 | 0.13 |
| Q313CLIMATE | 0.09 | 0.39 | -0.01 | 0.34 | 0.11 |
| Q332LRNNEW | -0.15 | 0.02 | 0.15 | 0.23 | 0.11 |
| Q340CRSES3 | 0.06 | 0.28 | 0.41 | 0.32 | 0.08 |
| Q341BEDSZ | -0.08 | 0.04 | 0.44 | 0.14 | -0.07 |
| Q326CHANGE | -0.03 | 0.11 | -0.08 | 0.09 | 0.00 |
| Q335ATTEND2 | 0.07 | 0.46 | 0.37 | -0.03 | -0.00 |

## Division of Variance Among Factors by Item

| New Factor | Factor[a] | Items[b] | Percent of Variance | Cumulative Percent of Variance |
|---|---|---|---|---|
| 1 | Social | 21, 31, 25, 7 | 5.36 | 53.6 |
| 2 | Comfort | 50, 44, 11 | 5.05 | 10.41 |
| 3 | Location | 28, 24, 15, 10 | 4.98 | 15.39 |
| 4 | Attend Alone | 51, 27, 37 | 4.60 | 19.99 |
| 5 | Attend Accompanied | 18, 20, 8 | 4.45 | 24.44 |
| 6 | Activity | 17, 29, 2 | 4.45 | 24.44 |
| 7 | Information | 39, 49 | 4.03 | 32.73 |
| 8 | Cost | 38, 48, 42 | 3.95 | 36.68 |
| 9 | Program | 16, 1, 3 | 3.85 | 40.53 |
| 10 | Personal Limitations | 22, 5, 34 | 3.81 | 44.34 |
| 11 | Escape | 6, 19 | 3.71 | 48.05 |
| 12 | Travel | 36, 33 | 3.63 | 51.68 |
| 13 | Organizational Attributes | 45, 16 | 3.58 | 55.26 |
| 14 | Accessibility | 12, 14, 30 | 3.40 | 58.66 |
| 15 | Previous Experience | 43, 52, 9 | 3.28 | 61.94 |

[a]The number of complete cases used in the factor analysis = 601 (74.1%); 201 (25.9%) cases were deleted because of missing data.

[b]Items 4, 13, 23, 26, 32, 35, 40, 41, and 47 did not meet the loading criteria of ≤ 0.50 and were therefore excluded from all subsequent statistical analyses.

**Items That Did Not Load at ≤ 0.50**

| Item # | |
|---|---|
| 04 | Studying at a college or university |
| 13 | Enjoying a certain climate |
| 23 | Accessibility by bus or train |
| 26 | Having a change from my daily routine |
| 32 | Learning something new |
| 35 | Attending 2 or more Elderhostel programs 'back to back' |
| 40 | A choice of 3 different courses at one site |
| 41 | Bed size |
| 47 | The reputation of the Elderhostel site |

## Thematic Codes Used to Determine the Decision-Making Factors

| # | Original Code – Included comments relating to: | # | Final Factor |
|---|---|---|---|
| 1 | Social | 1 | Social |
| 2 | Comfort | 2 | Comfort |
| 3 | Safe | | |
| 4 | Specific location | 3 | Location |
| 5 | Love visiting/travelling in Canada | | |
| 6 | Single traveller | 4 | Attend Alone |
| 7 | Joint-decisions | 5 | Attend Accompanied |
| 8 | Activity (seek physical activity/sport) | 6 | Activity |
| 9 | Outdoors | | |
| 10 | Avoid physical activity | | |
| 11 | Information | 7 | Information |
| 12 | Cost | 8 | Cost |
| 13 | Specific topic | 9 | Program |
| 14 | Desire to learn | | |
| 15 | Health limitation | 10 | Personal Limitations |
| 16 | Escape | 11 | Escape |
| 17 | Multipurpose trip | 12 | Travel |
| 18 | Off-season travel preference | | |
| 19 | Organizational comments | 13 | Organizational Attributes |
| 20 | Reputation of Elderhostel | | |
| 21 | Cancelled Program | | |
| 22 | Disappointed | | |
| 23 | Accessibility | 14 | Accessibility |
| 24 | Previous experience | 15 | Previous Experience |
| 25 | Choose specific dates | 16 | Dates |
| 26 | Available any time | | |
| 27 | Seasonal activities (e.g. gardening) | 17 | Seasonal Influence |
| 28 | Prefer winter | | |
| 29 | Prefer spring | | |
| 30 | Prefer summer | | |
| 31 | Prefer fall | | |
| 32 | Avoid winter | | |
| 33 | Avoid spring | | |
| 34 | Avoid fall | | |
| 35 | Avoid winter | | |
| 36 | Avoid the holidays | | |
| 37 | Summer cottage | | |
| 38 | Weather (seek or avoid) | | |
| 39 | Work | 18 | Work |
| xx[a] | Personal Reasons/ Miscellaneous | -- | Personal Reasons |
| xx[b] | Type of Experience | -- | -- |

Note 1: This category was used to cluster assorted comments that were either decision specific – a personal reason – or for miscellaneous comments.

Note 2: This category was used to group comments that related to the typology, the type of experience a person was seeking (e.g. adventure).

## The Pearson Correlation Matrix Related to Program Choice Factors & Select Demographic Variables

| r= | GENDER | COUNTRY | ENROL | ESCORT | EXPL | AO | CC | EXPER | OPP | SOC | COMF | LOC |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| GENDER | 1.00 | | | | | | | | | | | |
| COUNTRY | 0.10 | 1.00 | | | | | | | | | | |
| ENROL | -0.03 | 0.13 | 1.00 | | | | | | | | | |
| ESCORT | 0.15 | 0.15 | -0.04 | 1.00 | | | | | | | | |
| EXPLORE | 0.03 | 0.18 | 0.04 | -0.05 | 1.00 | | | | | | | |
| AO | 0.09 | -0.03 | -0.05 | 0.05 | 0.24 | 1.00 | | | | | | |
| CC | -0.02 | -0.12 | 0.01 | -0.16 | 0.01 | 0.00 | 1.00 | | | | | |
| EXPER | 0.03 | -0.23 | -0.20 | -0.00 | -0.31 | -0.02 | 0.01 | 1.00 | | | | |
| OPP | 0.13 | -0.03 | -0.13 | 0.05 | -0.09 | 0.06 | -0.07 | 0.28 | 1.00 | | | |
| SOCIAL | -0.07 | -0.03 | 0.06 | -0.14 | 0.17 | 0.05 | 0.07 | 0.06 | -0.03 | 1.00 | | |
| COMFORT | 0.05 | 0.02 | 0.12 | 0.12 | -0.23 | -0.12 | -0.01 | 0.12 | 0.09 | 0.16 | 1.00 | |
| LOCATION | 0.08 | 0.29 | 0.02 | 0.06 | 0.40 | 0.26 | -0.01 | -0.17 | 0.01 | 0.32 | 0.08 | 1.00 |
| SINGLE | -0.18 | -0.20 | -0.06 | -0.50 | -0.04 | -0.06 | 0.19 | 0.10 | 0.04 | 0.15 | 0.12 | -0.08 |
| ACCOMPANY | 0.16 | 0.14 | 0.00 | 0.74 | -0.06 | 0.01 | -0.11 | 0.01 | 0.01 | 0.05 | 0.21 | 0.16 |
| ACTIVITY | 0.13 | -0.00 | -0.02 | 0.04 | 0.31 | 0.63 | 0.05 | -0.07 | 0.07 | 0.15 | -0.06 | 0.34 |
| INFO | -0.02 | 0.00 | -0.08 | 0.04 | 0.14 | 0.09 | 0.02 | 0.10 | 0.09 | 0.26 | 0.20 | 0.23 |
| COST | -0.04 | -0.07 | -0.08 | -0.07 | 0.02 | 0.07 | 0.04 | 0.08 | 0.17 | 0.17 | 0.14 | 0.08 |
| PROGRAM | -0.04 | -0.04 | 0.03 | -0.15 | 0.13 | -0.04 | 0.41 | -0.07 | -0.16 | 0.22 | -0.01 | 0.18 |
| LIMITS | -0.06 | -0.11 | -0.00 | -0.03 | -0.12 | -0.32 | 0.06 | 0.13 | 0.11 | 0.17 | 0.26 | 0.00 |
| ESCAPE | -0.04 | -0.10 | 0.01 | -0.03 | -0.02 | -0.05 | 0.02 | 0.14 | 0.16 | 0.28 | 0.18 | 0.07 |
| TRAVEL | -0.02 | -0.07 | 0.03 | 0.13 | -0.03 | -0.01 | 0.01 | -0.05 | 0.00 | 0.17 | 0.19 | 0.13 |
| ORGATTR | -0.11 | 0.06 | 0.11 | -0.05 | 0.08 | -0.01 | -0.05 | -0.07 | -0.05 | 0.30 | 0.18 | 0.25 |
| ACCESS | -0.02 | -0.17 | 0.07 | 0.06 | -0.25 | -0.04 | 0.03 | 0.28 | 0.07 | 0.12 | 0.32 | -0.08 |
| PREVEXP | -0.04 | -0.29 | 0.25 | -0.09 | 0.03 | -0.01 | 0.06 | 0.11 | 0.04 | 0.28 | 0.20 | 0.07 |

| r = | SING | ACC | ACT | INFO | COST | PROG | LIMS | ESC | TRL | ORGAT | ACCES | PREVEXP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| SINGLE | 1.00 | | | | | | | | | | | |
| ACCOMP | -0.34 | 1.00 | | | | | | | | | | |
| ACTIVY | -0.01 | 0.06 | 1.00 | | | | | | | | | |
| INFO | 0.11 | 0.13 | 0.20 | 1.00 | | | | | | | | |
| COST | 0.24 | 0.00 | 0.14 | 0.32 | 1.00 | | | | | | | |
| PROGRAM | 0.12 | -0.06 | 0.06 | 0.07 | 0.06 | 1.00 | | | | | | |
| LIMITS | 0.15 | 0.01 | -0.22 | 0.17 | 0.15 | 0.09 | 1.00 | | | | | |
| ESCAPE | 0.13 | 0.07 | 0.09 | 0.21 | 0.26 | 0.09 | 0.28 | 1.00 | | | | |
| TRAVEL | -0.03 | 0.17 | 0.00 | 0.17 | 0.16 | 0.01 | 0.19 | 0.17 | 1.00 | | | |
| ORGATTR | 0.05 | 0.10 | 0.02 | 0.22 | 0.13 | 0.18 | 0.07 | 0.08 | 0.14 | 1.00 | | |
| ACCESS | 0.06 | 0.12 | 0.04 | 0.08 | 0.18 | 0.02 | 0.12 | 0.19 | 0.05 | 0.06 | 1.00 | |
| PREVEXP | 0.15 | 0.03 | 0.10 | 0.51 | 0.30 | 0.14 | 0.19 | 0.26 | 0.18 | 0.24 | 0.20 | 1.00 |

Note: Number of observations = 649

## Analysis of the Means for the 15 Factors Emerging from the Factor Analysis

| Factor Label | Factor $\bar{x}$ | $\alpha^a$ | Item | Description |
|---|---|---|---|---|
| #1 | | | 3.21 | Being part of a group |
| Social | 3.2 | 0.76 | 3.31 | Meeting new people |
| | | | 3.25 | Learning with people my own age |
| | | | 3.7 | Being with people who share my learning interest |
| #2 | | | 3.50 | Private toilet facilities |
| Comfort | 3.2 | 0.79 | 3.44 | Private bath/shower facilities |
| | | | 3.11 | Studying at a commercial site (e.g. hotel, lodge) |
| #3 | | | 3.28 | Exploring a particular geographic area |
| Location | 3.5 | 0.73 | 3.24 | Satisfying a curiosity about a geographical area |
| | | | 3.15 | Experiencing a different culture |
| | | | 3.10 | Finding a program that included educational field trips |
| #4 | | | 3.51 | The cost of single rooms |
| Single | 2.1 | 0.69 | 3.27 | Availability of single beds |
| | | | 3.37 | The availability of single rooms |
| #5 | | | 3.8 | Finding a shared interest with my travel companion |
| Accompanied | 3.3 | 0.82 | 3.18 | Agreeing on an Elderhostel with my travel companion |
| | | | 3.20 | Co-ordinating dates with a travel companion |
| #6 | | | 3.2 | Finding a program that involved being outdoors |
| Activity | 2.3 | 0.72 | 3.17 | Seeking a high level of physical activity |
| | | | 3.29 | Finding a program with a sports option |
| #7 | | | 3.39 | Advice from Elderhostel site co-ordinators or employees |
| Information | 2.5 | 0.56 | 3.49 | Word of mouth recommendation |
| #8 | | | 3.38 | The cost of travelling to and from the site |
| Cost | 2.5 | 0.63 | 3.48 | The program registration fee |
| | | | 3.42 | The Canadian dollar exchange rate |
| #9 | | | 3.16 | Following a program with one learning theme |
| Program | 3.3 | 0.57 | 3.1 | Studying a specific topic |
| | | | 3.3 | Expanding my knowledge |

| Factor Label | Factor $\bar{x}$ | $\alpha^a$ | Item | Description |
|---|---|---|---|---|
| #10 | | | 3.22 | Accommodating a physical limitation (e.g. walking) |
| Personal Limitations | 1.7 | 0.67 | 3.5 | Finding a program with minimal physical activity |
| | | | 3.34 | Accommodating a sensory limitation (e.g. hearing) |
| #11 | | | 3.6 | Forgetting personal worries |
| Escape | 1.9 | 0.81 | 3.19 | Forgetting responsibilities at home |
| #12 | | | 3.33 | Taking a holiday before or after Elderhostel |
| Travel | 2.1 | 0.51 | 3.36 | Visiting family or friends in the local area |
| #13 | | | 3.45 | The reputation of Elderhostel |
| Organizational Attributes | 4.2 | 0.71 | 3.46 | Descriptions in the Elderhostel catalogue |
| #14 | | | 3.12 | Accessibility by car |
| Accessibility | 2.2 | 0.61 | 3.14 | Driving to the site in less than 6 hours |
| | | | 3.30 | Driving to the site in less than 6 hours |
| #15 | | | 3.43 | A previous positive experience at a site |
| Previous Experience | 2.4 | 0.55 | 3.52 | A previous positive Elderhostel Canada experience |
| | | | 3.9 | Returning to a specific site |
| Other: | | | 3.4 | Studying at a college or university |
| | | | 3.13 | Enjoying a certain climate |
| | | | 3.23 | Accessibility by bus or train |
| Items which did not load on a factor at $\leq 0.50$ | -- | -- | 3.26 | Having a change from my daily routine |
| | | | 3.32 | Learning something new |
| | | | 3.35 | Attending 2 or more Elderhostel programs 'back to back' |
| | | | 3.40 | A choice of 3 different courses at one site |
| | | | 3.41 | The bed size |
| | | | 3.47 | The reputation of the Elderhostel site |
| Open | -- | -- | | 3.53 Other: _____ |

[a] Cronbach alpha

## Summary of the Written Responses Related to the Factor Analysis.

| Preferred Bed Size, Question 3.41 | | | | | |
|---|---|---|---|---|---|
| Bed Size Preference | n = 313[a] | % | Bed Size Preference | n = 313 | % |
| Twin | 80 | 25.6 | Twin or Queen | 2 | 0.7 |
| Double | 65 | 20.8 | Twin or King | 5 | 1.6 |
| Queen | 56 | 17.9 | 2 beds per room | 5 | 1.6 |
| King | 6 | 2.0 | Double or 2 Twins | 4 | 1.3 |
| Queen or King | 29 | 9.3 | Queen/King or 2 Twins | 7 | 2.3 |
| Double or Queen | 17 | 5.5 | Any size | 13 | 4.2 |
| Twin or Double | 7 | 2.3 | Other | 17 | 5.5 |

[a]36.8% of the respondents fill out this 'blank'.

Note: During the questionnaire development stage, the importance comfortable beds was discussed with several Elderhostelers at one site. It was brought to the researcher's attention that the issue was not, single vs. double, but rather the size of the bed that was important. As one hosteler explained, to a roaring crowd that nodded and laughed in agreement, "As you get older, you often get bigger and therefore you need a larger bed to sleep comfortably!" Because of this new this element, the Likert item in the questionnaire relating to beds was rewritten and a fill-in-the-blank line was included to allow participants to specify their preference. Although this item did not met the factor loading criteria, it did load on the comfort factor at 0.40, the information factor at 0.44, and 36.8% of the respondents filled in the blank . Beyond requesting specific bed sizes (twin being the most popular) one theme resonated strongly, if a queen or king size bed is not available for a couple, then two singles are preferred over a double sized bed.

## Other Items Reported in 3.53 Fill-in-the-blank section of the Factor Analysis Items

| Item | n= | Item | n = 75 |
|---|---|---|---|
| Accessibility | 2 | Location | 6 |
| Age | 1 | Meals | 2 |
| Care for pet | 1 | Miscellaneous | 9 |
| Comfort | 1 | Multipurpose trip | 1 |
| Climate | 1 | New experience | 1 |
| Cost | 1 | Organizational Assets | 15 |
| Dates | 8 | Previous experience with Elderhostel | 4 |
| Educational-travel | 1 | Program | 8 |
| Health | 4 | Single | 2 |
| Info | 3 | Social | 3 |
| Personal Limitations | 1 | | |

# *Appendix O - Auxiliary Information Related to Program Choice*

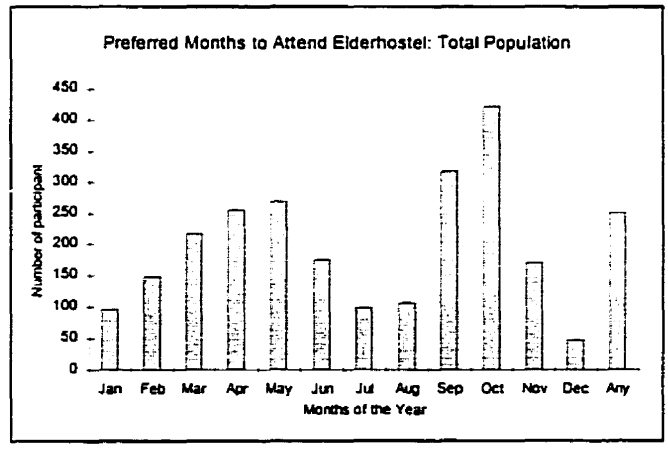
| Received a Personal Recommendation From: | n = 98 | % |
|---|---|---|
| Friend(s) | 46 | 46.9 |
| Other Elderhostelers | 21 | 21.5 |
| Specific name provided | 19 | 19.4 |
| Family member | 11 | 11.3 |
| Other | 1 | 1.1 |

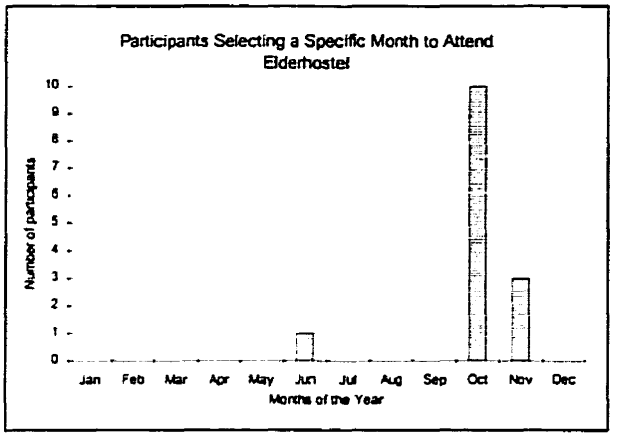
## Other Information Sources Influencing Program Choice

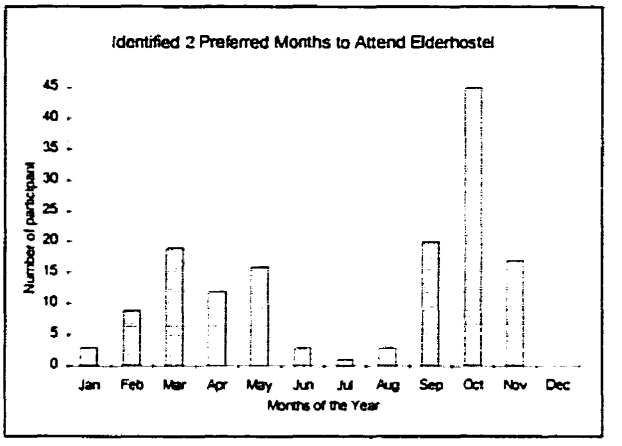
| Other | n = 76 | % | Other | n = 76 | % |
|---|---|---|---|---|---|
| Catalogue | 5 | 6.6 | Print media | 6 | 7.9 |
| Magazine | 1 | 1.4 | Speaker | 1 | 1.4 |
| Newspaper | 2 | 2.7 | Travel partner | 1 | 1.4 |
| Comparison shopping | 1 | 1.4 | TV show | 7 | 9.3 |
| Another Elderhosteler | 2 | 2.7 | An information session | 1 | 1.4 |
| Friends | 8 | 10.6 | Family member | 4 | 5.3 |
| Personal: Desire to visit the location (16)<br>Personal reason (2)<br>Previous experience with Elderhostel (12) | 30 | 39.5 | Comments Not Related to Sources of Info:<br>I'm a former Elderhostel employee (1)<br>Cost (1)<br>Dates (1)<br>Misc (3) | 7 | 9.3 |

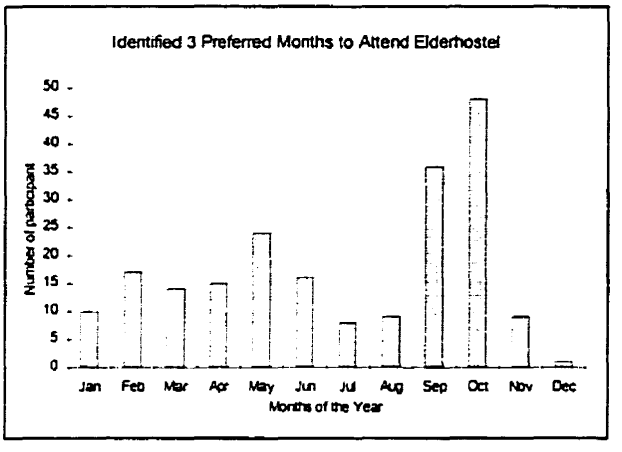
# *Appendix P - Analysis of Date Patterns*

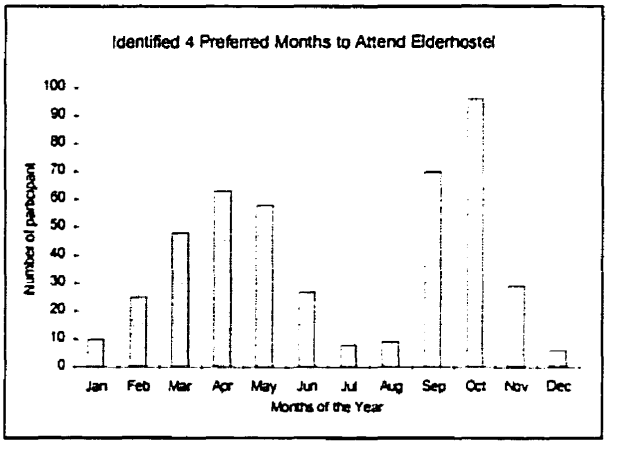
| Number of Months Each Respondent Identified for Enrolment with Elderhostel | N = | % of 811 |
|---|---|---|
| No Response | 54 | 6.7 |
| Identified 1 Month | 15 | 1.9 |
| Identified 2 Months | 74 | 9.2 |
| Identified 3 Months | 70 | 8.7 |
| Identified 4 Months | 112 | 13.9 |
| Identified 5 Months | 80 | 9.9 |
| Identified 6 Months | 68 | 8.4 |
| Identified 7 Months | 46 | 5.7 |
| Identified 8 Months | 18 | 2.3 |
| Identified 9 Months | 10 | 1.3 |
| Identified 10 Months | 7 | 0.9 |
| Identified 11 Months | 4 | 0.5 |
| All Months | 252 | 31.1 |

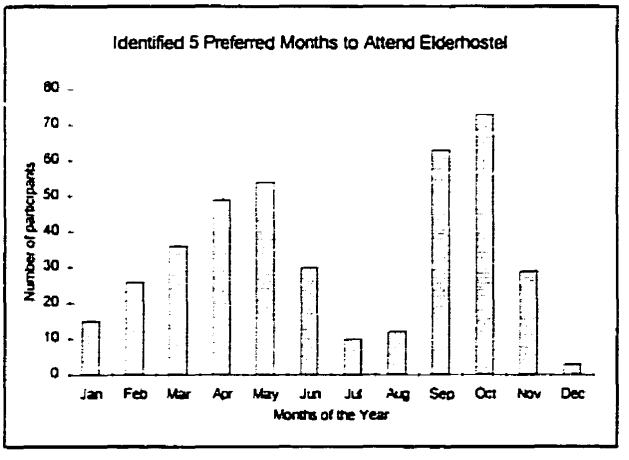


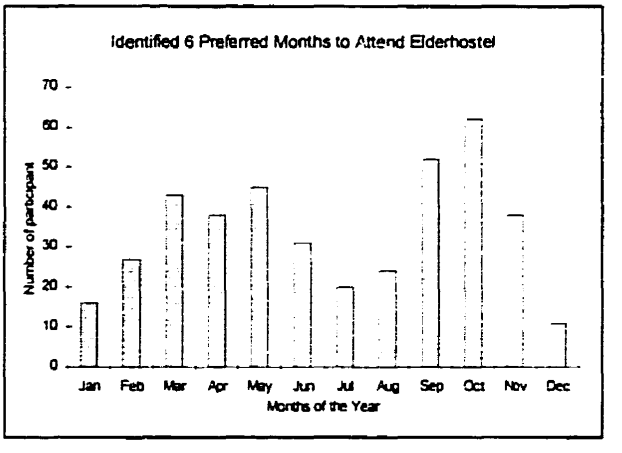

Participants Selecting a Specific Month to Attend Elderhostel
Number of participants
0
1
2
3
4
5
6
7
8
9
10
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year

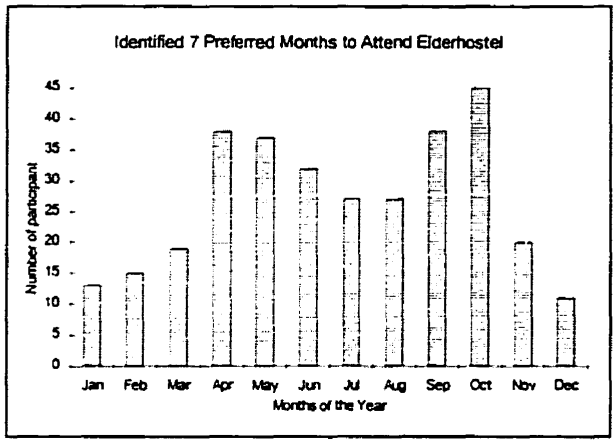

Identified 2 Preferred Months to Attend Elderhostel
Number of participant
0
5
10
15
20
25
30
35
40
45
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year

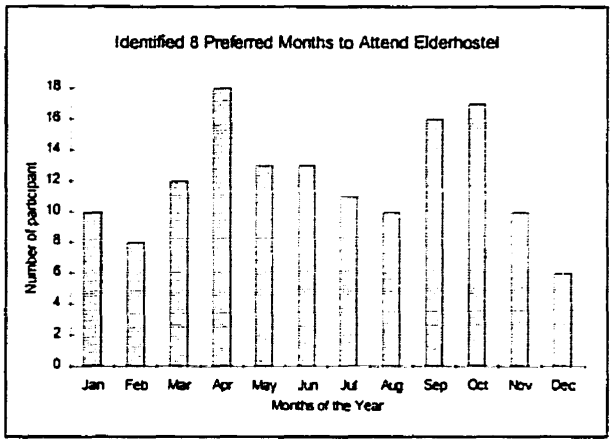

Identified 3 Preferred Months to Attend Elderhostel
Number of participant
0
5
10
15
20
25
30
35
40
45
50
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year

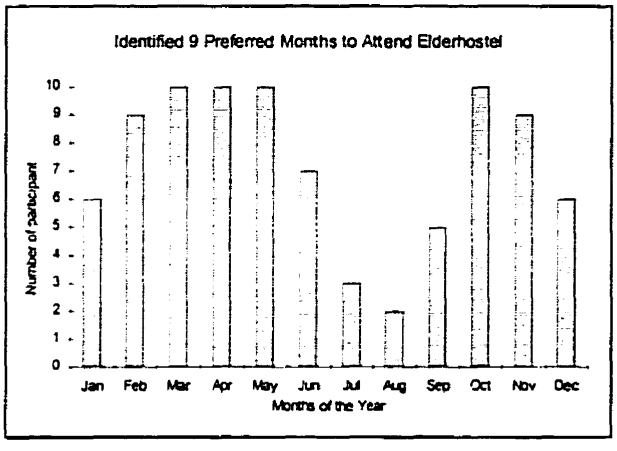

Identified 4 Preferred Months to Attend Elderhostel
Number of participant
0
10
20
30
40
50
60
70
80
90
100
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year

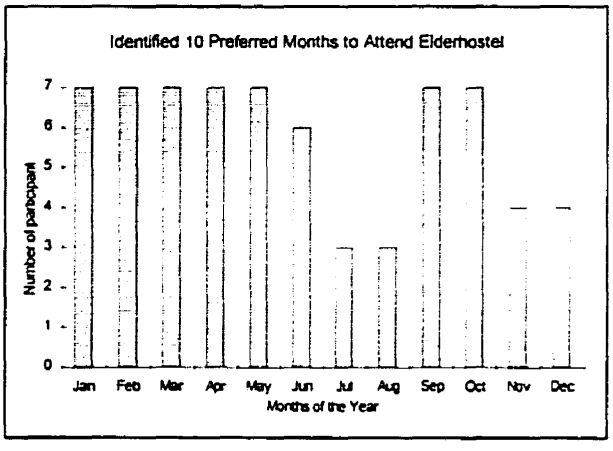

Identified 5 Preferred Months to Attend Elderhostel
Number of participants
0
10
20
30
40
50
60
70
80
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year

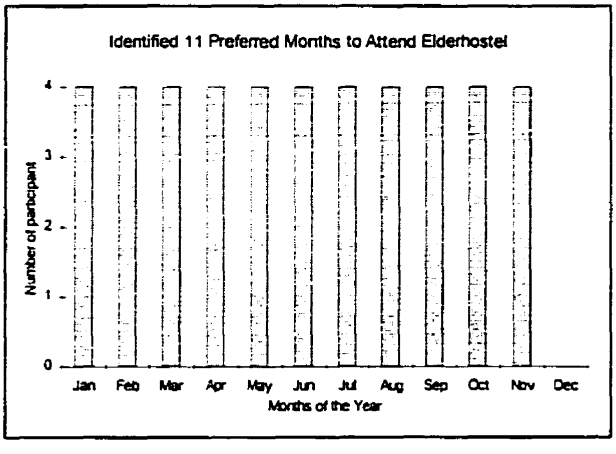

Identified 6 Preferred Months to Attend Elderhostel
Number of participant
0
10
20
30
40
50
60
70
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year


Identified 7 Preferred Months to Attend Elderhostel
Number of participant
0
5
10
15
20
25
30
35
40
45
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year


Identified 8 Preferred Months to Attend Elderhostel
Number of participant
0
2
4
6
8
10
12
14
16
18
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year


Identified 9 Preferred Months to Attend Elderhostel
Number of participant
0
1
2
3
4
5
6
7
8
9
10
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year


Identified 10 Preferred Months to Attend Elderhostel
Number of participant
0
1
2
3
4
5
6
7
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year


Identified 11 Preferred Months to Attend Elderhostel
Number of participant
0
1
2
3
4
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Months of the Year

# Appendix Q - Analysis of the Factor Mean Scores by Demographic Variable

| | Organizational Attributes | Location | Program | Attend Accompanied | Social | Comfort | Cost | Information | Previous Experience | Activity | Accessibility | Single | Travel | Escape | Limitations |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Population | 4.23 | 3.51 | 3.32 | 3.30 | 3.22 | 3.18 | 2.50 | 2.45 | 2.39 | 2.30 | 2.22 | 2.14 | 2.06 | 1.94 | 1.87 |
| Female | 4.29 | 3.48 | 3.34 | 3.14 | 3.26 | 3.10 | 2.54 | 2.48 | 2.43 | 2.23 | 2.18 | 2.29 | 2.05 | 1.97 | 1.89 |
| Male | 4.13 | 3.57 | 3.27 | 3.60 | 3.13 | 3.32 | 2.42 | 2.40 | 2.32 | 2.45 | 2.28 | 1.87 | 2.07 | 1.88 | 1.83 |
| Canada | 4.19 | 3.19 | 3.35 | 3.06 | 3.28 | 3.10 | 2.58 | 2.47 | 2.77 | 2.28 | 2.47 | 2.44 | 2.11 | 2.09 | 1.78 |
| USA | 4.26 | 3.73 | 3.29 | 3.46 | 3.17 | 3.23 | 2.45 | 2.44 | 2.14 | 2.32 | 2.05 | 1.94 | 2.03 | 2.83 | 1.80 |
| Attend Alone | 4.32 | 3.46 | 3.55 | 1.31 | 3.46 | 2.88 | 2.64 | 2.41 | 2.61 | 2.26 | 2.04 | 3.29 | 1.84 | 2.06 | 1.73 |
| Accompanied | 4.21 | 3.53 | 3.25 | 3.82 | 3.15 | 3.25 | 2.46 | 2.46 | 2.33 | 2.31 | 2.26 | 1.83 | 2.11 | 1.90 | 1.85 |
| New Participant | 4.11 | 3.44 | 3.27 | 3.27 | 3.08 | 2.92 | 2.65 | 2.66 | 1.82 | 2.37 | 2.08 | 2.31 | 1.99 | 1.93 | 1.80 |
| Return Participant | 4.26 | 3.54 | 3.32 | 3.31 | 3.25 | 3.23 | 2.46 | 2.40 | 2.53 | 2.29 | 2.24 | 2.10 | 2.08 | 1.94 | 1.88 |
| Explorer | 4.37 | 3.54 | 3.28 | 3.23 | 3.28 | 3.03 | 2.44 | 2.58 | 2.51 | 1.89 | 1.91 | 2.04 | 2.14 | 1.94 | 1.80 |
| Activity-Oriented | 4.13 | 3.42 | 3.08 | 3.46 | 3.18 | 3.25 | 2.47 | 2.28 | 2.32 | 2.60 | 2.38 | 1.97 | 2.07 | 1.94 | 1.49 |
| Content-Committed | 4.33 | 3.11 | 4.12 | 2.73 | 3.09 | 3.57 | 2.45 | 2.28 | 2.52 | 1.67 | 2.41 | 2.75 | 2.14 | 1.80 | 1.91 |
| Experimenter | 4.45 | 2.95 | 3.28 | 3.23 | 3.55 | 3.03 | 2.30 | 2.61 | 2.44 | 1.49 | 2.97 | 2.63 | 2.42 | 2.24 | 2.54 |
| Opportunist | 4.64 | 3.95 | 3.20 | 4.03 | 3.7 | 3.97 | 3.15 | 3.41 | 3.07 | 2.23 | 2.95 | 2.39 | 3.05 | 2.45 | 2.15 |

# *Appendix R - Step-Wise Regression Results for the Total Population*

Settings: Probability to Enter = 0.10; Probability to Remove = 0.10
SYSTAT Options: Forward, Automatic

***Explorer:***

Step # 7 R = 0.544 R-Square = 0.296; Term entered: ACCOMPANY

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 2 | SOCIAL | 0.09 | 0.04 | 0.08 | 0.84345 | 1 | 5.32 | 0.02 |
| 3 | COMFORT | -0.17 | 0.03 | -0.19 | 0.81777 | 1 | 28.50 | 0.00 |
| 4 | LOCATION | 0.34 | 0.04 | 0.31 | 0.76829 | 1 | 67.89 | 0.00 |
| 6 | ACCOMPANY | -0.05 | 0.02 | -0.07 | 0.92699 | 1 | 3.84 | 0.05 |
| 7 | ACTIVITY | 0.19 | 0.04 | 0.18 | 0.85803 | 1 | 24.75 | 0.00 |
| 8 | INFO | 0.06 | 0.03 | 0.08 | 0.86272 | 1 | 4.50 | 0.03 |
| 15 | ACCESS | -0.16 | 0.03 | -0.19 | 0.85079 | 1 | 27.22 | 0.00 |
| Out | | Part. Corr. | | | | | | |
| 5 | SINGLE | -0.02 | . | . | 0.80998 | 1 | 0.30 | 0.58 |
| 9 | COST | 0.00 | . | . | 0.84846 | 1 | 0.00 | 0.95 |
| 10 | PROGRAM | 0.05 | . | . | 0.92876 | 1 | 1.41 | 0.24 |
| 11 | LIMITS | -0.04 | . | . | 0.83393 | 1 | 0.99 | 0.32 |
| 12 | ESCAPE | -0.02 | . | . | 0.86149 | 1 | 0.32 | 0.57 |
| 13 | TRAVEL | -0.05 | . | . | 0.90875 | 1 | 1.71 | 0.19 |
| 14 | ORGATTR | 0.00 | . | . | 0.84689 | 1 | 0.01 | 0.93 |
| 16 | PREVEXP | 0.01 | . | . | 0.68294 | 1 | 0.12 | 0.73 |

***Activity-Oriented:***

Step # 6 R = 0.674 R-Square = 0.455; Term entered: ESCAPE

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 4 | LOCATION | 0.12 | 0.04 | 0.09 | 0.85214 | 1 | 8.16 | 0.00 |
| 7 | ACTIVITY | 0.74 | 0.04 | 0.58 | 0.82769 | 1 | 333.76 | 0.00 |
| 10 | PROGRAM | -0.10 | 0.04 | -0.07 | 0.95718 | 1 | 5.78 | 0.02 |
| 11 | LIMITS | -0.23 | 0.05 | -0.16 | 0.83303 | 1 | 24.92 | 0.00 |
| 12 | ESCAPE | -0.05 | 0.03 | -0.05 | 0.87300 | 1 | 2.39 | 0.12 |
| 13 | TRAVEL | -0.08 | 0.03 | -0.07 | 0.93167 | 1 | 5.70 | 0.02 |

| Out | | Part. Corr. | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 2 | SOCIAL | 0.01 | . | . | 0.78775 | 1 | 0.04 | 0.83 |
| 3 | COMFORT | -0.05 | . | . | 0.89414 | 1 | 1.58 | 0.21 |
| 5 | SINGLE | -0.02 | . | . | 0.93395 | 1 | 0.20 | 0.66 |
| 6 | ACCOMPANY | -0.03 | . | . | 0.94008 | 1 | 0.43 | 0.51 |
| 8 | INFO | 0.01 | . | . | 0.85881 | 1 | 0.11 | 0.74 |
| 9 | COST | 0.05 | . | . | 0.88447 | 1 | 1.36 | 0.24 |
| 14 | ORGATTR | -0.01 | . | . | 0.90578 | 1 | 0.07 | 0.79 |
| 15 | ACCESS | -0.03 | . | . | 0.93536 | 1 | 0.60 | 0.44 |
| 16 | PREVEXP | -0.01 | . | . | 0.87497 | 1 | 0.08 | 0.78 |

***Content-Committed:***

Step # 4 R = 0.457 R-Square = 0.209; Term entered: LOCATION

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 4 | LOCATION | -0.08 | 0.05 | -0.06 | 0.91763 | 1 | 2.44 | 0.12 |
| 5 | SINGLE | 0.15 | 0.04 | 0.14 | 0.97279 | 1 | 16.29 | 0.00 |
| 10 | PROGRAM | 0.64 | 0.05 | 0.42 | 0.93827 | 1 | 139.66 | 0.00 |
| 14 | ORGATTR | -0.17 | 0.06 | -0.11 | 0.91723 | 1 | 9.24 | 0.00 |

| Out | | Part. Corr. | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 2 | SOCIAL | 0.00 | . | . | 0.81365 | 1 | 0.00 | 0.96 |
| 3 | COMFORT | 0.00 | . | . | 0.94683 | 1 | 0.00 | 0.95 |
| 6 | ACCOMPANY | -0.03 | . | . | 0.86064 | 1 | 0.74 | 0.39 |
| 7 | ACTIVITY | 0.03 | . | . | 0.88802 | 1 | 0.70 | 0.40 |
| 8 | INFO | 0.01 | . | . | 0.89366 | 1 | 0.11 | 0.74 |
| 9 | COST | -0.00 | . | . | 0.91228 | 1 | 0.00 | 0.96 |
| 11 | LIMITS | 0.01 | . | . | 0.95622 | 1 | 0.04 | 0.84 |
| 12 | ESCAPE | -0.04 | . | . | 0.96864 | 1 | 0.97 | 0.33 |
| 13 | TRAVEL | 0.02 | . | . | 0.96881 | 1 | 0.27 | 0.61 |
| 15 | ACCESS | 0.02 | . | . | 0.97933 | 1 | 0.17 | 0.68 |
| 16 | PREVEXP | 0.02 | . | . | 0.90723 | 1 | 0.29 | 0.59 |

***Convenience-Oriented:***

Step # 9 R = 0.371 R-Square = 0.138; Term entered: SOCIAL

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'p' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 2 | SOCIAL | 0.08 | 0.04 | 0.08 | 0.74441 | 1 | 3.21 | 0.07 |
| 4 | LOCATION | -0.16 | 0.04 | -0.15 | 0.82826 | 1 | 13.93 | 0.00 |
| 8 | INFO | 0.08 | 0.03 | 0.10 | 0.84350 | 1 | 6.93 | 0.01 |
| 10 | PROGRAM | -0.08 | 0.04 | -0.07 | 0.91535 | 1 | 3.47 | 0.06 |
| 11 | LIMITS | 0.10 | 0.04 | 0.09 | 0.86876 | 1 | 5.29 | 0.02 |
| 12 | ESCAPE | 0.06 | 0.03 | 0.07 | 0.81383 | 1 | 3.07 | 0.08 |
| 13 | TRAVEL | -0.08 | 0.03 | -0.09 | 0.90960 | 1 | 5.58 | 0.02 |
| 14 | ORGATTR | -0.10 | 0.05 | -0.09 | 0.85121 | 1 | 4.68 | 0.03 |
| 15 | **ACCESS** | **0.18** | **0.03** | **0.22** | **0.92668** | **1** | **34.40** | **0.00** |
| Out | | Part. Corr. | | | | | | |
| 3 | COMFORT | 0.03 | . | . | 0.79492 | 1 | 0.68 | 0.41 |
| 5 | SINGLE | 0.05 | . | . | 0.91032 | 1 | 1.46 | 0.23 |
| 6 | ACCOMPANY | 0.01 | . | . | 0.92001 | 1 | 0.06 | 0.80 |
| 7 | ACTIVITY | -0.05 | . | . | 0.79414 | 1 | 1.76 | 0.18 |
| 9 | COST | 0.01 | . | . | 0.82114 | 1 | 0.03 | 0.86 |
| 16 | PREVEXP | 0.03 | . | . | 0.65452 | 1 | 0.49 | 0.49 |

***Opportunist:***

Step # 6 R = 0.293 R-Square = 0.086; Term entered: SOCIAL

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'p' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 2 | SOCIAL | -0.09 | 0.04 | -0.08 | 0.84597 | 1 | 4.16 | 0.04 |
| 7 | ACTIVITY | 0.08 | 0.04 | 0.08 | 0.88651 | 1 | 4.34 | 0.04 |
| 9 | COST | 0.13 | 0.04 | 0.13 | 0.89123 | 1 | 10.95 | 0.00 |
| 10 | **PROGRAM** | **-0.19** | **0.04** | **-0.17** | **0.94319** | **1** | **18.94** | **0.00** |
| 11 | LIMITS | 0.12 | 0.05 | 0.10 | 0.82481 | 1 | 6.00 | 0.01 |
| 12 | ESCAPE | 0.10 | 0.04 | 0.12 | 0.81227 | 1 | 8.49 | 0.00 |
| Out | | Part. Corr. | | | | | | |
| 3 | COMFORT | 0.04 | . | . | 0.89734 | 1 | 1.14 | 0.29 |
| 4 | LOCATION | 0.02 | . | . | 0.81012 | 1 | 0.38 | 0.54 |
| 5 | SINGLE | 0.01 | . | . | 0.90017 | 1 | 0.09 | 0.76 |
| 6 | ACCOMPANY | -0.02 | . | . | 0.98242 | 1 | 0.23 | 0.63 |
| 8 | INFO | 0.02 | . | . | 0.80857 | 1 | 0.28 | 0.59 |
| 13 | TRAVEL | -0.03 | . | . | 0.92055 | 1 | 0.72 | 0.40 |
| 14 | ORGATTR | -0.03 | . | . | 0.88509 | 1 | 0.63 | 0.43 |
| 15 | ACCESS | 0.02 | . | . | 0.93233 | 1 | 0.19 | 0.66 |
| 16 | PREVEXP | -0.01 | . | . | 0.82224 | 1 | 0.10 | 0.76 |

***Gender:***

Step # 5 R = 0.268 R-Square = 0.072; Term entered: COMFORT

| Effect | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|
| In | | | | | | | |
| 1 Constant | | | | | | | |
| 3 COMFORT | 0.03 | 0.02 | 0.08 | 0.88903 | 1 | 3.86 | 0.05 |
| **5 SINGLE** | **-0.06** | **0.02** | **-0.14** | **0.84541** | **1** | **11.07** | **0.00** |
| 6 ACCOMPANY | 0.04 | 0.01 | 0.11 | 0.81688 | 1 | 6.75 | 0.01 |
| 7 ACTIVITY | 0.06 | 0.02 | 0.12 | 0.99058 | 1 | 9.97 | 0.00 |
| 14 ORGATTR | -0.07 | 0.02 | -0.12 | 0.96142 | 1 | 9.37 | 0.00 |
| Out | Part. Corr. | | | | | | |
| 2 SOCIAL | -0.04 | . | . | 0.85826 | 1 | 1.03 | 0.31 |
| 4 LOCATION | 0.03 | . | . | 0.81841 | 1 | 0.48 | 0.49 |
| 8 INFO | -0.02 | . | . | 0.86263 | 1 | 0.25 | 0.62 |
| 9 COST | -0.02 | . | . | 0.88857 | 1 | 0.28 | 0.60 |
| 10 PROGRAM | 0.00 | . | . | 0.94725 | 1 | 0.01 | 0.93 |
| 11 LIMITS | -0.01 | . | . | 0.86981 | 1 | 0.05 | 0.83 |
| 12 ESCAPE | -0.04 | . | . | 0.93193 | 1 | 1.00 | 0.32 |
| 13 TRAVEL | -0.03 | . | . | 0.93465 | 1 | 0.58 | 0.45 |
| 15 ACCESS | -0.02 | . | . | 0.88629 | 1 | 0.15 | 0.70 |
| 16 PREVEXP | -0.01 | . | . | 0.88484 | 1 | 0.11 | 0.74 |

***Country:***

Step # 10 R = 0.496 R-Square = 0.246; Term entered: ACCOMPANY

| Effect | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|
| In | | | | | | | |
| 1 Constant | | | | | | | |
| 3 COMFORT | 0.05 | 0.02 | 0.12 | 0.76879 | 1 | 8.80 | 0.00 |
| **4 LOCATION** | **0.16** | **0.02** | **0.30** | **0.80973** | **1** | **62.07** | **0.00** |
| 5 SINGLE | -0.05 | 0.02 | -0.11 | 0.80812 | 1 | 8.36 | 0.00 |
| 6 ACCOMPANY | 0.02 | 0.01 | 0.06 | 0.78713 | 1 | 2.39 | 0.12 |
| 7 ACTIVITY | -0.05 | 0.02 | -0.10 | 0.80555 | 1 | 7.30 | 0.01 |
| 8 INFO | 0.05 | 0.02 | 0.13 | 0.65718 | 1 | 9.12 | 0.00 |
| 11 LIMITS | -0.04 | 0.02 | -0.07 | 0.81120 | 1 | 3.63 | 0.06 |
| 13 TRAVEL | -0.04 | 0.02 | -0.08 | 0.88994 | 1 | 5.43 | 0.02 |
| 15 ACCESS | -0.05 | 0.02 | -0.12 | 0.83907 | 1 | 10.87 | 0.00 |
| 16 PREVEXP | -0.15 | 0.02 | -0.32 | 0.68166 | 1 | 59.59 | 0.00 |
| Out | Part. Corr. | | | | | | |
| 2 SOCIAL | -0.03 | . | . | 0.79699 | 1 | 0.68 | 0.41 |
| 9 COST | 0.05 | . | . | 0.78365 | 1 | 1.57 | 0.21 |
| 10 PROGRAM | -0.03 | . | . | 0.92812 | 1 | 0.51 | 0.47 |
| 12 ESCAPE | -0.01 | . | . | 0.82478 | 1 | 0.04 | 0.83 |
| 14 ORGATTR | 0.05 | . | . | 0.86230 | 1 | 1.67 | 0.20 |

***Enrolment:***

Step # 6 R = 0.398 R-Square = 0.158 Term entered: SINGLE

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 3 | COMFORT | 0.04 | 0.01 | 0.11 | 0.92144 | 1 | 9.01 | 0.00 |
| 5 | SINGLE | -0.02 | 0.01 | -0.07 | 0.92476 | 1 | 3.38 | 0.07 |
| 8 | INFO | -0.09 | 0.01 | -0.28 | 0.68914 | 1 | 42.60 | 0.00 |
| 9 | COST | -0.05 | 0.02 | -0.11 | 0.82608 | 1 | 7.93 | 0.01 |
| 14 | ORGATTR | 0.04 | 0.02 | 0.07 | 0.91444 | 1 | 3.81 | 0.05 |
| 16 | **PREVEXP** | **0.15** | **0.02** | **0.40** | **0.68919** | **1** | **86.89** | **0.00** |
| Out | | Part. Corr. | | | | | | |
| 2 | SOCIAL | 0.01 | . | . | 0.84250 | 1 | 0.14 | 0.71 |
| 4 | LOCATION | 0.04 | . | . | 0.88160 | 1 | 1.29 | 0.26 |
| 6 | ACCOMPANY | -0.02 | . | . | 0.80558 | 1 | 0.40 | 0.53 |
| 7 | ACTIVITY | 0.01 | . | . | 0.94388 | 1 | 0.11 | 0.74 |
| 10 | PROGRAM | -0.01 | . | . | 0.94124 | 1 | 0.03 | 0.87 |
| 11 | LIMITS | -0.04 | . | . | 0.88484 | 1 | 0.92 | 0.34 |
| 12 | ESCAPE | -0.02 | . | . | 0.87549 | 1 | 0.26 | 0.61 |
| 13 | TRAVEL | -0.00 | . | . | 0.91097 | 1 | 0.00 | 0.95 |
| 15 | ACCESS | 0.01 | . | . | 0.86088 | 1 | 0.06 | 0.81 |

---

***Escort:***

Step # 6 R = 0.792 R-Square = 0.627 Term entered: TRAVEL

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 2 | SOCIAL | -0.06 | 0.01 | -0.13 | 0.87109 | 1 | 26.37 | 0.00 |
| 3 | COMFORT | 0.02 | 0.01 | 0.04 | 0.87099 | 1 | 3.05 | 0.08 |
| 5 | SINGLE | -0.09 | 0.01 | -0.26 | 0.82939 | 1 | 100.75 | 0.00 |
| 6 | **ACCOMPANY** | **0.18** | **0.01** | **0.64** | **0.80814** | **1** | **576.67** | **0.00** |
| 13 | TRAVEL | 0.02 | 0.01 | 0.04 | 0.92277 | 1 | 2.82 | 0.09 |
| 14 | ORGATTR | -0.03 | 0.01 | -0.07 | 0.88726 | 1 | 7.46 | 0.01 |
| Out | | Part. Corr. | | | | | | |
| 4 | LOCATION | -0.02 | . | . | 0.85473 | 1 | 0.35 | 0.55 |
| 7 | ACTIVITY | 0.03 | . | . | 0.96436 | 1 | 0.44 | 0.51 |
| 8 | INFO | 0.04 | . | . | 0.86204 | 1 | 1.07 | 0.30 |
| 9 | COST | 0.02 | . | . | 0.88412 | 1 | 0.30 | 0.58 |
| 10 | PROGRAM | -0.05 | . | . | 0.91956 | 1 | 1.86 | 0.17 |
| 11 | LIMITS | 0.04 | . | . | 0.87838 | 1 | 0.98 | 0.32 |
| 12 | ESCAPE | -0.03 | . | . | 0.86841 | 1 | 0.44 | 0.51 |
| 15 | ACCESS | 0.02 | . | . | 0.88463 | 1 | 0.16 | 0.69 |
| 16 | PREVEXP | -0.05 | . | . | 0.85472 | 1 | 1.54 | 0.22 |

# *Appendix S - Multiple Regression Results for the Total Population*

| Variable | Explorer | Convenience-Oriented | Opportunist | Content-Committed | Activity-Oriented | Gender | Country | Enrol | Escort | Canonical Correlation |
|---|---|---|---|---|---|---|---|---|---|---|
| **INDEPENDENT VARIABLES** | | | | | | | | | | |
| Explorer | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.28 |
| Experimenter | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.34 |
| Opportunist | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0.09 |
| Content-Committed | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0.11 |
| Activity-Oriented | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0.26 |
| Gender | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0.29 |
| Country | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0.06 |
| Enrolment | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0.45 |
| Escort | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0.63 |
| **R =** | 0.55 | 0.38 | 0.31 | 0.46 | 0.68 | 0.29 | 0.50 | 0.40 | 0.80 | 0.82 |
| **$R^2$= Explained Variance[a,b]** | 0.29 | 0.13 | 0.07 | 0.19 | 0.45 | 0.06 | 0.23 | 0.14 | 0.64 | 0.64 |
| **DEPENDENT VARIABLES** | | | | | | | | | | |
| CONSTANT | 2.55 | 1.87 | 1.80 | 1.03 | 2.69 | 1.45 | 1.48 | 1.59 | 1.67 | -- |
| 1. Social | 0.10 | 0.08 | -0.08 | 0.01 | 0.03 | -0.02 | -0.01 | 0.01 | -0.05 | 0.21 |
| 2. Comfort | -0.16 | 0.01 | 0.04 | 0.01 | -0.03 | 0.04 | 0.04 | 0.04 | 0.01 | 0.27 |
| 3. Location | 0.34 | -0.15 | 0.03 | -0.09 | 0.11 | 0.03 | 0.16 | 0.02 | -0.01 | 0.40 |
| 4. Single | -0.03 | 0.04 | 0.00 | 0.14 | -0.03 | -0.05 | -0.05 | -0.03 | -0.09 | 0.41 |
| 5. Accompanied | -0.05 | 0.01 | -0.01 | -0.02 | -0.02 | 0.03 | 0.02 | -0.01 | 0.18 | 0.70 |
| 6. Activity | 0.19 | -0.06 | 0.08 | 0.08 | 0.73 | 0.06 | -0.05 | 0.00 | 0.02 | 0.59 |
| 7. Information | 0.07 | 0.08 | 0.03 | 0.00 | 0.01 | -0.01 | 0.05 | -0.09 | 0.02 | 0.32 |
| 8. Cost | 0.00 | 0.00 | 0.13 | -0.01 | 0.06 | 0.00 | 0.02 | -0.04 | 0.00 | 0.19 |
| 9. Program | 0.06 | -0.08 | -0.20 | 0.63 | -0.10 | 0.00 | -0.02 | 0.00 | -0.02 | 0.44 |
| 10. Personal Limitations | -0.04 | 0.06 | 0.11 | 0.03 | -0.24 | 0.00 | -0.04 | -0.02 | 0.02 | 0.24 |
| 11. Escape | -0.02 | 0.06 | 0.11 | -0.05 | -0.05 | -0.01 | 0.00 | -0.01 | -0.01 | 0.15 |
| 12. Travel | -0.04 | -0.08 | -0.04 | 0.04 | -0.08 | -0.01 | -0.04 | 0.00 | 0.01 | 0.20 |
| 13. Organizational Attributes | 0.01 | -0.10 | -0.05 | -0.19 | -0.01 | -0.07 | 0.03 | 0.03 | -0.03 | 0.21 |
| 14. Accessibility | -0.16 | 0.19 | 0.01 | 0.02 | -0.02 | -0.01 | -0.05 | 0.00 | 0.00 | 0.29 |
| 15. Previous Experience | 0.01 | 0.02 | -0.02 | 0.01 | -0.02 | 0.01 | -0.15 | 0.15 | -0.03 | 0.49 |

[a] Adjusted $R^2$ = (1-(1-R)*(N-1)/df where n=643 and df = 627.

[b] Wilks Lambda = 0.33; F-statistic = 137.06, df=9; n = 619; $p < .01$

# *Appendix T - The Churchill Manitoba Example*

**Comparisons of the Factor Means between the Churchill Participants and the Total Population**

| Factor | Name | Churchill Mean | Total Population Mean |
|---|---|---|---|
| 1 | Social | 2.9 | 3.2 |
| 2 | Comfort | 2.3 | 3.2 |
| 3 | Location | 3.8 | 3.5 |
| 4 | Single | 2.1 | 2.1 |
| 5 | Accompanied | 3.0 | 3.3 |
| 6 | Activity | 2.4 | 2.3 |
| 7 | Information | 2.5 | 2.5 |
| 8 | Cost | 2.4 | 2.5 |
| 9 | Program | 3.7 | 3.3 |
| 10 | Personal Limitations | 1.5 | 1.7 |
| 11 | Escape | 1.7 | 1.9 |
| 12 | Travel | 1.5 | 2.1 |
| 13 | Organizational Attributes | 4.2 | 4.2 |
| 14 | Accessibility | 1.3 | 2.2 |
| 15 | Previous Experience | 2.1 | 2.4 |

**Division of Churchill Participants into Types**

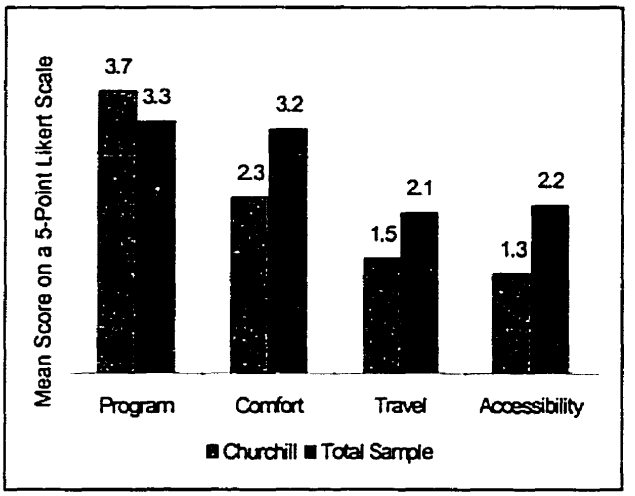
n = 116

| Participant Types | Experimenter | Activity Oriented | Content Committed | Convenience Oriented | Opportunist | Total |
|---|---|---|---|---|---|---|
| Explorer | 27% | -- | -- | -- | -- | 27% |
| Activity-Oriented | 22% | 28% | -- | -- | -- | 50% |
| Content-Committed | 4% | 5% | 4% | -- | -- | 13% |
| Convenience-Oriented | -- | -- | -- | -- | -- | -- |
| Opportunist | 1% | -- | 1% | -- | -- | 2% |
| COLUMN TOTAL | 54% | 33% | 5% | -- | -- | 92% |

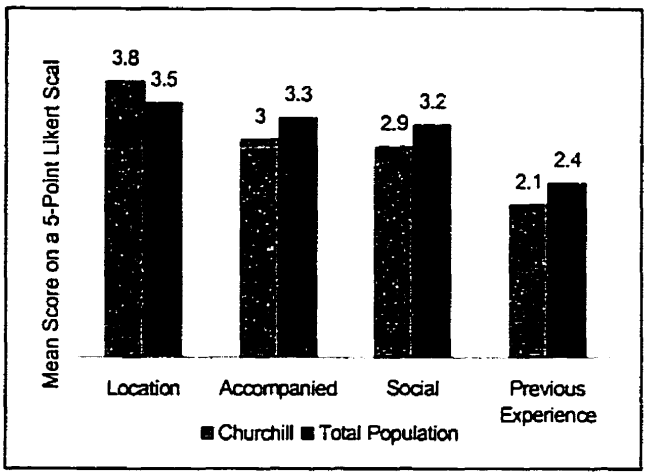
Note 1: 3% indicated 3 or more equal scores of 4s or 5s could not be typed

Note 2: 4% rated all categories <4.0 could not be typed

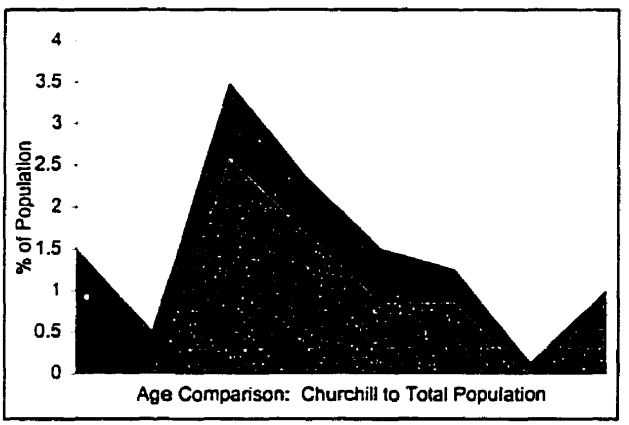
Largest Difference in Mean Factor Scores



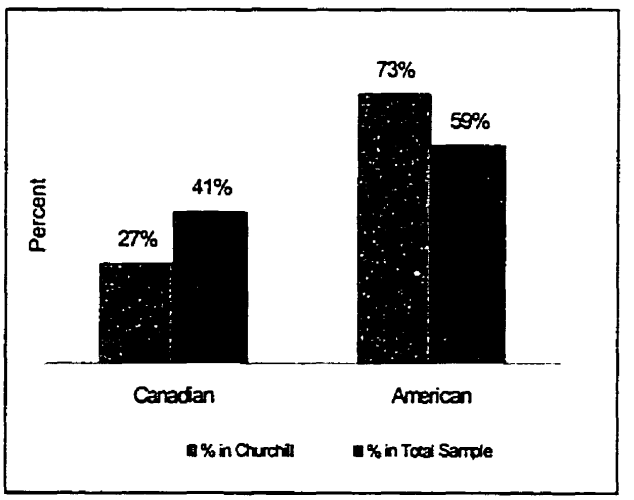

Slight Differences in the Mean Scores



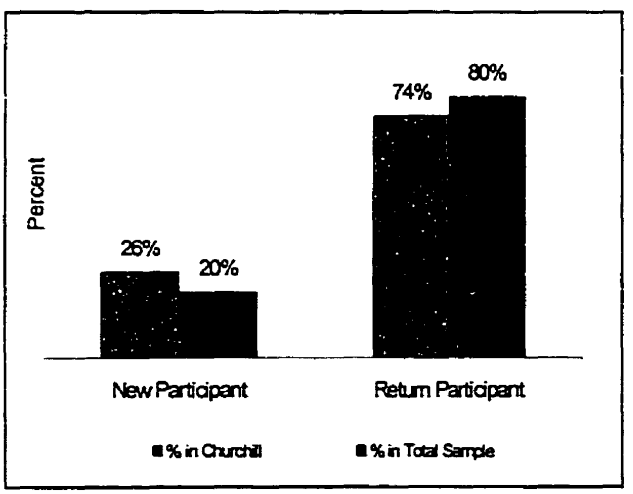

Age Comparison




Country Comparisons




New and Return Participants



## Churchill, Manitoba Step-Wise Regression Results

***The Explorer:***

N = 90; 25 case(s) deleted due to missing data.
Minimum tolerance for entry into model = 0.000000
Forward stepwise with Alpha-to-Enter R = 0.100 and Alpha-to-Remove=0.100
Step # 4 R = 0.554 R-Square = 0.307
Term entered: ACCOMPANY

| | Effect | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 2 | SOCIAL | 0.24 | 0.09 | 0.25 | 0.84815 | 1 | 6.52 | 0.01 |
| 4 | LOCATION | 0.49 | 0.12 | 0.40 | 0.81934 | 1 | 16.47 | 0.00 |
| 5 | SINGLE | -0.16 | 0.08 | -0.19 | 0.99320 | 1 | 4.33 | 0.04 |
| 6 | ACCOMPANY | -0.12 | 0.06 | -0.18 | 0.93921 | 1 | 3.71 | 0.06 |
| Out | | Part. Corr. | | | | | | |
| 3 | COMFORT | 0.04 | . . | | 0.73888 | 1 | 0.11 | 0.74 |
| 7 | ACTIVITY | 0.14 | . . | | 0.90626 | 1 | 1.59 | 0.21 |
| 8 | INFO | 0.10 | . . | | 0.86302 | 1 | 0.82 | 0.37 |
| 9 | COST | 0.08 | . . | | 0.95741 | 1 | 0.62 | 0.43 |
| 10 | PROGRAM | -0.09 | . . | | 0.90204 | 1 | 0.68 | 0.41 |
| 11 | LIMITS | -0.13 | . . | | 0.96160 | 1 | 1.36 | 0.25 |
| 12 | ESCAPE | 0.10 | . . | | 0.83362 | 1 | 0.80 | 0.37 |
| 13 | TRAVEL | -0.08 | . . | | 0.96726 | 1 | 0.61 | 0.44 |
| 14 | ORGATTR | 0.10 | . . | | 0.83472 | 1 | 0.83 | 0.36 |
| 15 | ACCESS | -0.00 | . . | | 0.90672 | 1 | 0.00 | 0.99 |
| 16 | PREVEXP | 0.09 | . . | | 0.85341 | 1 | 0.69 | 0.41 |

---

***The Activity-Oriented***

N = 88; 27 case(s) deleted due to missing data.
Dependent Variable: AO
Minimum tolerance for entry into model = 0.000000
Forward stepwise with Alpha-to-Enter R = 0.100 and Alpha-to-Remove=0.100
Step # 1 R = 0.617 R-Square = 0.381
Term entered: ACTIVITY

| | Effect | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 7 | ACTIVITY | 0.81 | 0.11 | 0.62 | 1.00000 | 1 | 53.51 | 0.00 |
| Out | | Part. Corr. | | | | | | |
| 2 | SOCIAL | 0.04 | . . | | 0.99499 | 1 | 0.15 | 0.70 |
| 3 | COMFORT | -0.14 | . . | | 0.96846 | 1 | 1.61 | 0.21 |
| 4 | LOCATION | 0.07 | . . | | 0.98186 | 1 | 0.40 | 0.53 |
| 5 | SINGLE | -0.07 | . . | | 0.96031 | 1 | 0.41 | 0.53 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 6 | ACCOMPANY | -0.01 | . | . | 0.94344 | 1 | 0.00 | 0.96 |
| 8 | INFO | 0.01 | . | . | 0.98142 | 1 | 0.01 | 0.93 |
| 9 | COST | 0.07 | . | . | 0.93082 | 1 | 0.38 | 0.54 |
| 10 | PROGRAM | -0.16 | . | . | 0.99641 | 1 | 2.12 | 0.15 |
| 11 | LIMITS | -0.14 | . | . | 0.90616 | 1 | 1.75 | 0.19 |
| 12 | ESCAPE | -0.11 | . | . | 0.99092 | 1 | 1.13 | 0.29 |
| 13 | TRAVEL | -0.07 | . | . | 0.99174 | 1 | 0.46 | 0.50 |
| 14 | ORGATTR | 0.15 | . | . | 0.99980 | 1 | 2.06 | 0.15 |
| 15 | ACCESS | -0.10 | . | . | 0.90172 | 1 | 0.79 | 0.38 |
| 16 | PREVEXP | 0.05 | . | . | 0.95554 | 1 | 0.22 | 0.64 |

***Enrolment - New vs. Return Participants:***

Step # 6 R = 0.398 R-Square = 0.158

n = 659; 152 case(s) deleted due to missing data.

Term entered: SINGLE

| Effect | | Coefficient | Std Error | Std Coef | Tol. | df | F | 'P' |
|---|---|---|---|---|---|---|---|---|
| In | | | | | | | | |
| 1 | Constant | | | | | | | |
| 3 | COMFORT | 0.04 | 0.01 | 0.11 | 0.92144 | 1 | 9.01 | 0.00 |
| 5 | SINGLE | -0.02 | 0.01 | -0.07 | 0.92476 | 1 | 3.38 | 0.07 |
| 8 | INFO | -0.09 | 0.01 | -0.28 | 0.68914 | 1 | 42.60 | 0.00 |
| 9 | COST | -0.05 | 0.02 | -0.11 | 0.82608 | 1 | 7.93 | 0.01 |
| 14 | ORGATTR | 0.04 | 0.02 | 0.07 | 0.91444 | 1 | 3.81 | 0.05 |
| 16 | PREVEXP | 0.15 | 0.02 | 0.40 | 0.68919 | 1 | 86.89 | 0.00 |
| Out | | Part. Corr. | | | | | | |
| 2 | SOCIAL | 0.01 | . | . | 0.84250 | 1 | 0.14 | 0.71 |
| 4 | LOCATION | 0.04 | . | . | 0.88160 | 1 | 1.29 | 0.26 |
| 6 | ACCOMPANY | -0.02 | . | . | 0.80558 | 1 | 0.40 | 0.53 |
| 7 | ACTIVITY | 0.01 | . | . | 0.94388 | 1 | 0.11 | 0.74 |
| 10 | PROGRAM | -0.01 | . | . | 0.94124 | 1 | 0.03 | 0.87 |
| 11 | LIMITS | -0.04 | . | . | 0.88484 | 1 | 0.92 | 0.34 |
| 12 | ESCAPE | -0.02 | . | . | 0.87549 | 1 | 0.26 | 0.61 |
| 13 | TRAVEL | -0.00 | . | . | 0.91097 | 1 | 0.00 | 0.95 |
| 15 | ACCESS | 0.01 | . | . | 0.86088 | 1 | 0.06 | 0.81 |