

## Sharing Their Good Fortune: Boomers and Giving Back

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### Overview

As the saying goes, for Boomers, "it's all about me." Or is it?

While Boomers (born between 1946-1964) have often been referred to as the "Me Generation," now, having experienced the personal and historical events that define their values as a generation, many Boomers are giving careful thought to helping others. In fact, four in five Boomers say "I have been very fortunate in life," and this positive view of their lives is manifested in finding ways to sharing their good fortune.

For many time pressed Boomers, writing a check allows them to contribute while conserving precious time. According to the most recent Consumer Expenditure Survey, Boomers made cash contributions of almost \$100 Billion in 2006, amounting to an average of \$6,000 for every Boomer.<sup>1</sup>

Clearly Boomers are generous with their contributions but what are their attitudes about "giving back" to society? Do they believe it is their responsibility to give back? How do they do it? Is it more than just writing a check? Do they give their time? Do they buy from companies that support their communities? Focalyst explored volunteer attitudes and behaviors among a nationally representative sample of over 17,000 Boomers and found that they *are* "giving back."

### Key Findings:

- Boomers have a desire to give back with time; four out of 5 Boomers say they are willing to volunteer their time for a good cause, and a quarter have volunteered their time to a charitable cause in the last year alone.
- Even if they have the desire to give back in time, many Boomers find it easier to contribute more passively by purchasing products from companies that will contribute a portion of the profits to charity, a positive sign for cause marketing.
- Boomers that do volunteer are much more likely to also be "green" shoppers, as 60% of Boomer Volunteers say they try to buy products that are environmentally safe.
- Age alone is not significantly related to the act of volunteering – Boomers are just as likely to donate time to a cause as are their elders (Matures born 1945 and prior).
- Some Boomers are predisposed to volunteering as part of how they approach life.

### Boomers are Stepping Forward to Give Back

Boomers have positive intentions about giving back, with almost 4 of 5 Boomers (59 million) saying they are willing to volunteer their time for a good cause and 7 of 10 saying they have a responsibility to make the world a better place. But are these good intentions translating into action?

Eighteen million (1 in 4) have volunteered their time to a charitable organization in the last year alone, and, after they retire, 20% of the 58 million employed Boomers (12 million) say they will volunteer part time. Boomers are also mindful of their social responsibility through their shopping habits. Focalyst found that well over half (57%) pay attention to the companies they patronize, taking into account whether the organizations themselves give back (see Figure 1).

**59 million Boomers say they are willing to volunteer their time for a good cause**

Figure 1

### Boomers and Giving Back: Attitudes and Behaviors



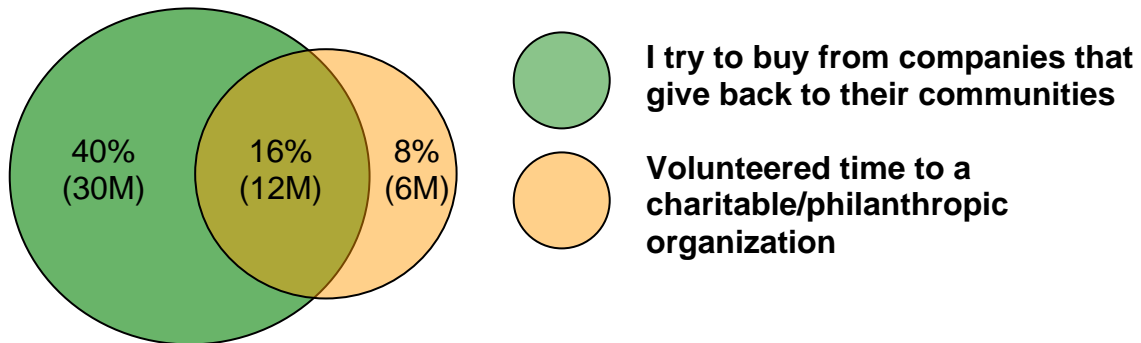
Source: Focalyst

### Boomers Buy from Companies that Give Back

Many members of this generation are conscious about giving back even when they are shopping. Over 42 million Boomers try to give back by buying from companies that support the local community. This is more than twice the number of those who have volunteered. There appears to be a divide between those who give back in a more passive way and those who are more active in the process by donating their own time to charitable organizations (Figure 2).

Figure 2

### Boomers: Active vs. Passive Philanthropy



Source: Focalyst

However, there is overlap between the active volunteers and those who give back in a more passive way. About 1 in 6 Boomers (12 million) buy from companies that give back *and* actively volunteer. This group of "super-philanthropic" Boomers display similar characteristics of the *Green Boomer* that Focalyst described in a previous report, "It's Good to be Green": they are socially responsible shoppers. They also have greater financial resources and stronger attitudes toward the greater good.

Only a small portion of Boomers (6 million) actively give back with time but do not look to buy from companies that claim to support specific causes. Clearly, this reflects a level of skepticism among some Boomers who separate giving their own time from causes promoted by a company or organization. This group may be critical of companies who claim to support charity – and may feel that some cause marketing campaigns are not authentic.

#### Shopping Behaviors of Boomer Volunteers

As mentioned previously, the Boomer Volunteer has many overlapping characteristics with the Green Boomer. Over half (54%) can also be labeled as "Green Boomers," those who are mindful of the environmental impact of products by buying brands that are environmentally safe (Figure 3).

Figure 3

### Shopping Habits of Boomer Volunteers



Source: Focalyst

Socially conscious shopping attitudes are even more prevalent among the Volunteer Boomers. They are significantly more likely to shop green, with 60% who buy brands that are environmentally safe. The Volunteer Boomers are especially more likely to make purchase decisions that are consistent with giving back to the community, such as supporting local retailers (88%), buying from companies that give back to their communities (67%), and choosing locally produced goods (54%). They are also more savvy shoppers than non-volunteers, researching products and services (59%), shopping for better quality (57%), and buying organic (38%).

***Socially conscious shopping attitudes are even more prevalent among the Boomer Volunteers***

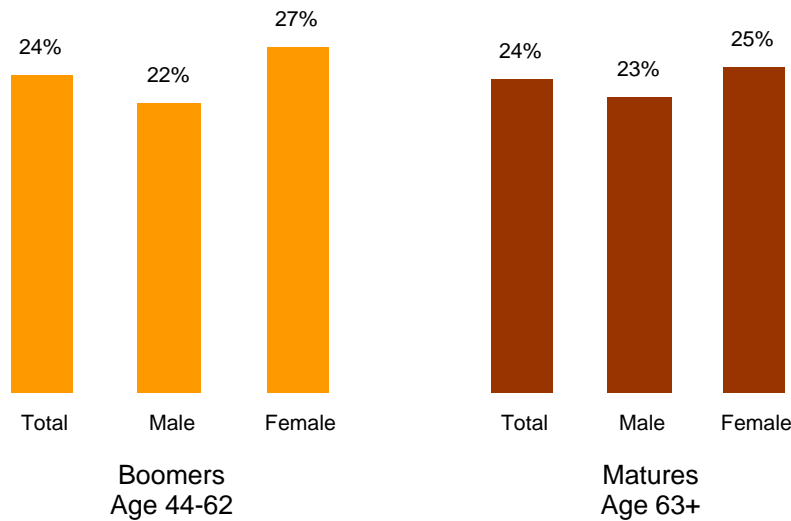
These findings suggest that cause-marketing programs can be very successful with time-crunched Boomers with more disposable income. These campaigns must be authentic and fit with the brand if they are to be successful (for example, the Avon Walk for Breast Cancer, etc). Savvy Boomers will see through attempts to "hijack" a cause that is not relevant to the brand.

### Who are the Boomer Volunteers?

It is no surprise that to volunteer, you need to have enough time and resources, be in good health, and be free of the stresses of certain life-changing events. One may think that older age groups who are more likely to be retired with more free time would volunteer. Surprisingly, Focalyst found that among Boomers and Matures, age alone is not significantly related to volunteer behavior. Boomers are not waiting until retirement to donate their time – and with many Boomers working past retirement age, we may see Boomers both working and volunteering well into their sixties and beyond (Figure 4).

Figure 4

### Volunteered Time to a Charitable/Philanthropic Organization, Past Year



Source: Focalyst

Boomer women are more likely to volunteer (10M in the past year) but men also give their time (8M in past year). Women volunteers are more likely to be homemakers, many with children still living in the home which presents them with volunteer opportunities through school, sports teams, community fundraisers, etc.

Financial resources appear to play a greater role in volunteer behavior than being employed or not. Across all age groups, Boomers with higher income levels are more likely to volunteer. Boomers with lower household incomes have similar attitudes about their greater responsibility, but with the added stress of making ends meet, volunteering is not something they can make time for.

### Life Values & Volunteerism

Life stage is composed of a combination of characteristics, including demographics, attitudes, health, etc. It also includes a person's core values – what is important in the

lives of these people. These core values appear to influence a person's desire to volunteer, and ultimately their decision to do so.

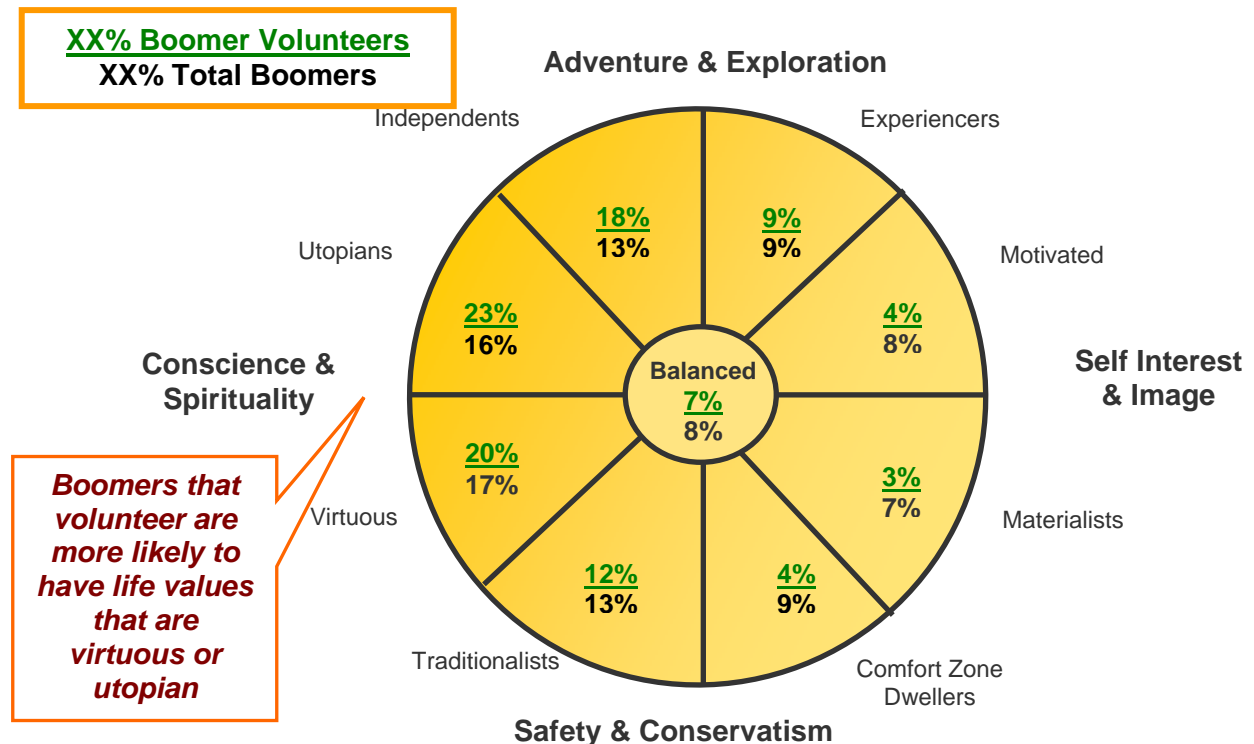
Focalyst's segmentation of Boomers is based on a set of life values and attitudes derived from Shalom Schwartz's Psychological model of universal human attitudes.<sup>2</sup> According to the model, a person's priorities may be determined by beliefs that have been found to be universal and consistent across cultures around the world:

- **Conscience and Spirituality vs. Self-Interest and Image:** Is the individual motivated by concern for others or by concern for self-enhancement?
- **Adventure and Exploration vs. Safety and Conservatism:** Does the individual seek change and novelty or feel more comfortable with the 'tried and true'?

Boomers who volunteer are significantly more likely to be on the Conscience/Spirituality side of the model, and can be considered Utopians or Independents (Figure 5). These people are looking at the "bigger picture", who feel a greater responsibility, and who feel time is more important than money. For example, Boomer volunteers are nearly twice as likely as non-volunteers to attend religious/prayer services, and to take continuing education courses (either for a degree or not).

Figure 5

### Life Values: Boomer Volunteers vs. All Boomers



Source: Focalyst

The desire to give back appears to be intrinsic in nature – strongly linked to a person's core values. Time and resources enable people to volunteer but the key ingredient is one's own internal compass that points to helping others.

### Conclusions

Boomers are giving back in multiple ways – with their time, through monetary donations, and in the decisions they make when shopping. Boomers who volunteer are more likely to have stronger values toward the greater good and their legacy. Time and resources play an important role, however, with no age or employment differences between volunteers and non-volunteers, the desire to donate time appears to be more intrinsic in nature.

There are over 42 million Boomers who are trying to give back through the companies they patronize. In addition, the volunteer Boomer shares many shopping habits with the Green Boomer, suggesting a generation of consumers that are mindful of corporate social responsibility. Marketers targeting Boomers and beyond should be aware that their image as a company that cares and is socially responsible can be an important competitive advantage among millions of Boomers.

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<sup>1</sup> Focalyst analysis of the 2006 US Consumer Expenditure Survey.

<sup>2</sup> Schwartz & Bilsky, *The Journal of Personality and Social Psychology*, Vol 53, No.3, 1987.

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