

**MERTON U3A  
MEMBERSHIP SURVEY  
2013 Report**

**December 2013**

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## **1 Introduction: Background to the survey**

In the UK, as well as in other countries, U3A aims to be inclusive and to extend membership to both men and women, to people from all ethnic backgrounds and to people of all social classes (Ware, 2013; Wright 2013).

In the summer of 2012, a communications review conducted at the request of the Merton U3A (MU3A) Committee recommended that strategies should be developed to target groups which were under-represented in the organisation's membership.

### **1.1 Gender-balance of membership**

At present, the membership of MU3A does not reflect the population of the London Borough of Merton in terms of gender balance or ethnicity. Although men account for 46% of both the 50+ and the 65+ age groups in Merton, at the beginning of 2013 men constituted only around 20% of members (Ware 2013). While this is in line with the membership patterns of other U3As in London and elsewhere, it was of concern to MU3A's Committee that the organisation was clearly failing to attract men and a research project was initiated to address the possible reasons for this and to suggest ways in which more men could be attracted to the organisation (see Ware 2013).

### **1.2 Geographical distribution of members**

Committee members were also aware that the majority of members of MU3A lived in the western part of the borough and that the organisation struggled to attract members from the eastern wards. This pattern broadly coincided with borough statistics on the location of older residents who are largely White British and born in the UK, with higher levels of education, employment in management and professional occupations and lower levels of deprivation than other parts of the borough (Ware 2013).

### **1.3 Lack of information on members**

Like many other U3As, MU3A has not routinely collected demographic data on members so has had no basis for analysis of factors such as age, marital status, past and present employment, educational experience, leisure interests and other activities, all of which, as indicated in the literature, are relevant to the take-up of learning and leisure activities in later life (Ware 2013). While there was a general awareness that MU3A members were predominantly female, white and middle-class, there were no data to confirm this as the only information routinely collected about members was their address.

Not only was there a lack of demographic data on MU3A's membership; there was no information on how members had heard of U3A, their reasons for joining, the activities in which they participated or their preferences for different approaches to learning, different types of venue and different time-scheduling of activities.

Information on group membership, based on membership renewal forms, was not comprehensive or reliable (Ware 2013).

#### **1.4 The need for information on Merton U3A's membership**

In an article published in 2012, Formosa concluded that the U3A movement in Britain was at a crossroads and needed to consider some fundamental changes in order to become more in tune with the needs and interests of today's older adults (Formosa 2012). Formosa noted that men and older people from ethnic minority groups were under-represented in U3A as a whole and made a number of suggestions for making U3A truly inclusive of older people from all sections of society. "The key challenge faced by U3As" suggested Formosa "is to remain in tune and relevant to the life-world of present and incoming older cohorts." (Formosa 2012:15).

As a result of the MU3A communications review, research was undertaken on the under-representation of men in U3A as a whole. A report on the research (Ware 2012) drew on the small amount of existing research undertaken on U3As in the UK and other countries, data produced by U3As in the London Region and Surrey Network and Census data to suggest possible reasons for the under-inclusion of men in MU3A and make recommendations for how this might be addressed.

Alongside this research, it was decided by members of the MU3A Committee that a short survey questionnaire should be designed to be sent to existing members to elicit information that would assist the organisation to make changes to increase its inclusivity.

## **2 Methods**

In summer 2013, a small group of MU3A Committee members met to design a short questionnaire to be mailed to all existing members with subscription renewal forms. The questionnaire included questions on personal characteristics (age, gender, ethnicity, disability, educational qualifications and employment status), how individuals had heard about U3A, reasons for joining, preferred learning methods, preferred learning venues, days and times when members were available to participate in U3A activities and suggestions for improving MU3A. (See Appendix for a copy of the questionnaire).

A copy of the questionnaire was posted to all existing members (N = 863) in August 2013 with the updated 'Guide to Groups' and subscription renewal forms. Members were advised that they could return the questionnaire with their membership renewal form or, if they preferred, return it separately to ensure confidentiality. The returned questionnaires were passed from the Membership Secretary to a MU3A member with experience of survey analysis (Ann Salvage) and apart from a very small number of members who chose to give their names on their returned questionnaires, all questionnaires were anonymous.

### 3 Analysis

Data from the received questionnaires were entered into an Excel spreadsheet by a MU3A member with expertise in this area (Peter Mott) and manipulated using bespoke formulae to allow cross-tabulation of data. Chi-square tests using an online calculator (<http://graphpad.com/quickcalcs/contingency2/>) were applied to selected contingency data to check for gender and age differences (see Appendix 1 for an explanation of statistical significance testing). Qualitative data including comments written on the questionnaires and suggestions for improving MU3A (Question 13) were subjected to thematic analysis.

## 4 Results

### 4.1 Response rates

Of the 863 survey questionnaires mailed to MU3A members, 422 were returned (response rate = 49%). While it is necessary, in interpreting the results of the survey, to bear in mind that half of the membership did not return the questionnaire, this response rate compares reasonably well with response rates for similar surveys.

### 4.2 Characteristics of respondents

#### 4.2.1 Age and gender

Of the 422 members who returned questionnaires, nearly three-quarters (N = 297; 70%) were female and 76 (18%) were male. Forty five respondents did not complete the question on gender and 12 did not give their age.

Table 1 shows respondents by age and gender (respondents who answered both questions only). Nearly three-quarters of respondents (73%) were aged between 60 and 79 (40% were 60-69; 33% were 70-79) and numbers in the highest and lowest age groups were very small (3% 50-59; 2% 90+).

**TABLE 1: Respondents by age and gender (where both known)**

Age	Male		Female		Total	
	N	(%)	N	(%)	N	(%)
50-9	2	(3)	11	(4)	13	(3)
60-9	36	(46)	112	(38)	148	(40)
70-9	19	(25)	105	(35)	124	(33)
80-9	17	(22)	62	(21)	79	(21)
90-9	2	(3)	6	(2)	8	(2)
100+	0	(0)	1	(<1)	1	(<1)
<b>Total</b>	76		297		373	

#### 4.2.2 Ethnicity

Table 2 shows the ethnic group of those who responded to the survey questionnaire.

**TABLE 2: Ethnicity by gender**

	Male	Female	Not specified	Total	
				N	(%)
<b>White British</b>	68	260	33	361	(88)
<b>White other</b>	4	21	3	28	(7)
<b>Asian British/Asian</b>	1	5	0	6	(1)
<b>Black British/Black African /Black Caribbean or Other Black</b>	1	0	1	2	(<1)
<b>Other ethnic group</b>	1	9	1	11	(3)
<b>Mixed ethnic group</b>	0	1	0	1	(<1)
<b>Total</b>	75	296	38	409	

Four hundred and nine respondents indicated their ethnic group and of these, the vast majority (361:88%) described themselves as 'White British'. Twenty-eight respondents (7%) chose 'White Other' and only eight (2%) described themselves as from an Asian or black ethnic group (a further 11 (3%) selected 'other ethnic group'), suggesting that MU3A's membership is predominantly white. Ethnicity did not vary significantly between age groups.

#### 4.2.3 First language

Respondents were asked to indicate whether or not English was their first language. Four hundred and seven respondents answered this question and Table 3 shows responses by gender.

**TABLE 3: Is English Your First Language?**

	Male	Female	Not specified	Total	
				N	(%)
<b>Yes</b>	68	266	36	370	(91)
<b>No</b>	7	28	2	37	(9)
<b>Total</b>	75	294	38	407	

The vast majority of respondents (370:91% of those who answered this question) indicated that English was their first spoken language. Those for whom English was not their first spoken language cited nineteen different first languages including Welsh, French, Spanish, Italian, Chinese, Russian, Japanese, Dutch, Arabic, Hindustani and Hindi.

#### 4.2.4 Disability

Respondents were asked to indicate whether they had a disability that affected their participation in U3A. Ninety-nine respondents (just under a quarter of all who returned a questionnaire) indicated a disability (see Table 4).

**TABLE 4: Disability by gender**

	Male	Female	Not specified	Total *	
				N	(%)
<b>Mobility</b>	11	36	8	55	(56)
<b>Hearing</b>	4	21	1	26	(26)
<b>Sight</b>	2	6	5	13	(13)
<b>Speaking</b>	1	3	0	4	(4)
<b>Other</b>	4	6	3	13	(13)
<b>Total *</b>	18	67	14	99	

(\* **NOTE:** Some respondents gave multiple responses)

Of those who said they had a disability that affected their participation in U3A, most cited problems with mobility (56% of those who said they had a disability:13% of all who returned questionnaires), with hearing problems affecting 26% (6% of all respondents), sight problems affecting 13% (3% of all respondents) and speaking problems affecting 4% (1% of all respondents).

Thirteen people reported other disabilities, which included kidney failure, anxiety, mental problems, leg pain, very old age and difficulty in using a pen.

Men and women were almost equally likely to say they had a disability (24% of total men and 23% of total women).

Those aged 90 or more were most likely to report mobility problems (38% compared with 19% of those aged 50-59 and 10% of those aged 60-69)<sup>1</sup> but numbers were too small to test for significance and there were no other significant differences between age groups.

#### 4.2.5 Educational qualifications

Respondents were asked to indicate their highest educational qualification. Many respondents gave more than one response to this question and all responses were included in the analysis. Four hundred and twelve respondents answered this question and Table 5 shows responses by gender.

**TABLE 5: Educational qualifications by gender**

	Male	Female	Not specified	Total*	
				N	(%)
<b>Undergraduate degree</b>	24	91	17	132	(32)
<b>College certificate or diploma</b>	11	75	8	94	(23)
<b>School leaving certificate (15-18)</b>	12	68	12	92	(22)
<b>Postgraduate degree</b>	15	52	9	76	(18)

<sup>1</sup> These percentages relate to the number of people reporting problems as a percentage of all respondents who indicated they were in this age group.



<b>Vocational qualification</b>	16	47	8	71	(17)
<b>No formal education</b>	3	5	4	12	(3)
<b>Other</b>	5	19	0	24	(6)
<b>Total *</b>	74	297	47	412	

(\* **NOTE:** Many respondents gave multiple responses)

As one might perhaps expect, the MU3A members who completed the questionnaire were relatively well-qualified, with almost one third (32%) having an undergraduate degree and almost a fifth (18%) having a postgraduate degree. Men were slightly more likely than women to have vocational qualifications (men 22%: women 16%) and women slightly more likely to have a college certificate or diploma (women 25%: men 15%), but these differences were not significant and the pattern was otherwise similar for men and women.

In general, the proportion of respondents who had an undergraduate degree decreased with increasing age (e.g. 47% of those aged 50-59 compared with 27% of those aged 80 or more). Vocational qualifications were more common among older respondents (e.g. only 6% of those aged 50-59 compared with 24% of those aged 80 or more). Neither of these age differences was statistically significant.

#### 4.2.6 Employment status

Table 6 shows the current employment status of respondents by gender.

**TABLE 6: Employment status by gender**

	<b>Male</b>	<b>Female</b>	<b>Not specified</b>	<b>Total*</b>	
				<b>N</b>	<b>(%)</b>
<b>Retired</b>	64	260	27	351	(87)
<b>Working part-time</b>	9	32	6	47	(12)
<b>Working full-time</b>	2	2	0	4	(1)
<b>Other</b>	1	4	1	6	(1)
<b>Total</b>	75	296	34	405	

(\* **NOTE:** Some respondents gave multiple responses)

Four hundred and five respondents indicated their current employment status. As would be expected (given the criteria for membership of U3A) the vast majority of respondents indicated that they were retired (351:87%). Forty seven (12%) were working part-time and only four (1%) said they were working full-time. It is not known whether those who were working full-time had been doing so at the time they joined MU3A, or whether they had changed their status since joining but had continued their membership. Patterns of employment were very similar for men and women. As would be expected, the percentage of respondents who said they were retired increased with increasing age (e.g. 31% of those aged 50-59 compared with 96% of

those aged 80 or more) and there was a corresponding decrease in the proportion who said they were working full-or part-time.

### 4.3 Becoming a member

#### 4.3.1 Sources of information about U3A

Respondents were asked where they had heard about U3A. Three hundred and sixty nine respondents (87% of the total who returned a questionnaire) answered this question and Table 7 shows responses by gender.

**TABLE 7: 'How did you hear about us?' by gender**

	Male	Female	Not specified	Total *	
				N	(%)
<b>Friends</b>	34	165	32	231	(63)
<b>Library</b>	6	21	7	65	(18)
<b>Relatives</b>	11	9	1	21	(6)
<b>Wimbledon Fair</b>	1	13	0	14	(4)
<b>Newspapers</b>	3	8	0	10	(3)
<b>Internet</b>	2	6	0	8	(2)
<b>Magazines</b>	1	5	0	5	(1)
<b>Word of mouth</b>	0	3	0	3	(<1)
<b>Retirement cse</b>	2	1	0	3	(<1)
<b>Advertisement</b>	0	3	0	3	(<1)
<b>Other</b>	6	33	1	40	(11)
<b>Total *</b>	63	267	39	369	

(\* **NOTE:** Many respondents gave multiple responses)

By far the most frequently mentioned source of information was word of mouth (63% of respondents said they had heard about U3A from friends, 6% from relatives and a further 1% said they had heard about U3A by "word of mouth". Eighteen percent of respondents had obtained information from a library and 4% had obtained information at the annual Wimbledon Fair (where MU3A has an information stall). Very few respondents had obtained information via the media (Internet, newspapers, magazines or advertisements).

Men were significantly more likely to have heard about U3A from relatives (17% of men who answered this question compared with 3% of women who did so) and of men who cited a relative, half cited their wives. Women were a little more likely to say they had heard about U3A from a library (19% compared with 10% of men) but this was not a statistically significant difference.

#### 4.3.2 Reasons for joining U3A

Respondents were asked to give their reasons for joining U3A. Table 8 shows responses to this question by gender.

**TABLE 8: Reasons for joining U3A by gender**

	Male	Female	Not specified	Total *	
				N	(%)
<b>Gain knowledge</b>	48	211	29	288	(69)
<b>Mix with stimulating people</b>	37	175	31	243	(58)
<b>Make new friends</b>	24	144	18	186	(44)
<b>Personal satisfaction</b>	29	109	13	151	(36)
<b>Escape daily routine</b>	8	47	12	67	(16)
<b>Curiosity</b>	10	52	5	67	(16)
<b>Other</b>	8	24	1	33	(8)
<b>Total *</b>	76	299	44	419	

(\* **NOTE:** Many respondents gave multiple responses)

The main reason given for joining U3A was 'To gain knowledge': 69% of respondents gave this as a reason for joining. Having an opportunity to mix with stimulating people was the next most popular reason for joining (58%), followed by 'To make new friends' (44%), 'Personal satisfaction' (36%), 'To escape daily routine' (16%) and 'Curiosity' (16%).

Other reasons included a desire to participate in a particular activity or interest group (11), interesting activities (3), a desire to occupy spare time (3), and a wish to give rather than to receive (2).

Women were significantly more likely than men to say they had joined to make new friends (women 48%: men 32%). They were also slightly more likely than men to give 'to mix with stimulating people' as a reason for joining (women 59%: men 49%) and 'to gain knowledge' (women: 71%: men 63%) but these differences were not statistically significant.

## 4.4 Participation in U3A

### 4.4.1 Preferred methods of learning

Respondents were asked to indicate their preferred methods of learning. Most respondents (415) answered this question, with many giving multiple responses. Table 9 shows responses to this question by gender.

**TABLE 9: Preferred method of learning by gender**

	Male	Female	Not specified	Total *	
				N	(%)
<b>Learning informally in regular group</b>	58	226	31	315	(76)
<b>Attending talks</b>	28	180	22	230	(55)
<b>Attending group visits</b>	17	117	15	149	(36)

<b>Short course with formal structure</b>	17	88	10	115	(28)
<b>Online learning alone</b>	2	15	4	21	(5)
<b>Online learning with others</b>	1	7	2	10	(2)
<b>Other</b>	3	6	0	9	(2)
<b>Total *</b>	74	299	42	415	

(\* **NOTE:** Many respondents gave multiple responses)

The most popular learning method for both male and female members was 'learning informally in a group that meets together regularly'. Three hundred and fifteen of those who responded to this question (76%) indicated that this was a preferred learning method. Attending talks was the second most popular option, with 230 (55% of those who answered this question) giving this as a choice. 'Attending group visits' was chosen by 149 (36%) and 115 members (28%) would like to undertake a short course with a formal structure.

Only 5% of respondents said that they would like to learn through an online learning course on their own and even fewer (2%) through an online learning course with other people.

Women were significantly more likely to say they would be interested in talks (women 60%: men 37%) and also significantly more likely to express interest in group visits (women 39%: men 22%) but for both men and women, learning informally in a group meeting regularly was the most frequent choice.

Short courses were significantly more popular among younger respondents (56% of those aged 50-59 said they would be interested in studying in this way compared with 19% of those aged 80 or more) but other than this there were no significant differences between age groups.

#### 4.4.2 Preferred venues for learning

Members were asked to indicate their preferences for learning venues. Most respondents (418) answered this question and Table 10 shows responses by gender.

**TABLE 10: Preferred learning venues by gender**

	Male	Female	Not specified	N	Total * (%)
<b>Members' homes</b>	46	150	25	221	(53)
<b>No Preference</b>	19	110	12	141	(34)
<b>Hired space (e.g. hall/room /sports facility)</b>	20	92	18	130	(31)

<b>Free public space (e.g. library/park)</b>	11	71	15	97	(23)
<b>Cafe/restaurant/pub</b>	8	40	5	53	(13)
<b>Other</b>	1	7	0	8	(2)
<b>Total *</b>	74	301	43	418	

(\* **NOTE:** Many respondents gave multiple responses)

One hundred and forty one respondents (34%) indicated that they had no preference for learning venue. For those who did express a preference, the most popular learning venue was members' homes; 221 respondents (53%) chose this option. One hundred and thirty (31%) indicated that they would like to learn in a hired space such as a hall, workshop or sports facility, 97 (23%) chose a free public space (e.g. library or park) and 53 (13%) a cafe, restaurant or pub.

Men were slightly more likely to opt for meetings held in people's homes (men 62%: women 50%) and women slightly more likely to opt for free public spaces (women 24%: men 15%) or to have no preferences (women 37%: men 26%) but none of these differences were statistically significant.

Respondents in the youngest age group (50-59) were the most likely to be interested in learning in a 'free public space' (44% compared with 20% of those aged 80 or more) but this difference was not quite significant and there were no other significant differences between age groups.

#### 4.4.3 Availability to participate in U3A activities

In order to establish the most favourable times for scheduling events, respondents were asked when they were available to participate in U3A activities. Three hundred and seventy five respondents answered this question and responses are shown in Table 11.

**TABLE 11: Availability to participate in U3A activities by gender**

	Male	Female	Not specified	Total * N	(%)
<b>Mon- Fri Daytime</b>	66	264	28	358	(95)
<b>Mon- Fri Evening</b>	23	100	10	133	(35)
<b>Weekend</b>	20	104	9	133	(35)
<b>Other</b>	5	9	2	16	(4)
<b>Total *</b>	72	273	30	375	

(\* **NOTE:** Many respondents gave multiple responses)

By far the most popular choice of time was Monday-Friday daytime: 358 of those who responded to this question (95%) said they were available during weekdays. Just over a third indicated that they were available on weekday evenings (133:35%) and the same number indicated weekend availability. Women tended to be more likely to say they were available at weekends (women 38%: men 28%), but this was not a statistically significant difference.

Younger respondents were more likely to say they were available on weekday evenings (e.g. 44% of those aged 50-59 compared with 27% of those aged 80 or more) but this difference was not statistically significant and there were no other significant differences between age groups.

#### 4.5 Suggestions for improving Merton U3A

The final question on the survey questionnaire invited respondents to make suggestions for improving Merton U3A. A quarter of respondents (106) made a comment here and Table 12 summarises the issues raised. Men were slightly more likely than women to make comments (33% compared with 25%) but this difference was not statistically significant.

**TABLE 12: Suggestions for improving Merton U3A**

	<b>N *</b>	<b>(%) *</b>
<b>Satisfaction with existing arrangements</b>	48	(45)
<b>Suggestions for types of activities/courses/talks</b>	17	(16)
<b>Suggestions for/problems with existing groups</b>	10	(9)
<b>Widen membership to reflect Merton population</b>	8	(8)
<b>Membership renewal process/cost</b>	6	(6)
<b>Size of membership</b>	5	(5)
<b>Newsletter</b>	5	(5)
<b>Publicity</b>	4	(4)
<b>Not a member long enough to comment</b>	4	(4)
<b>Suggestions for new groups</b>	3	(3)
<b>Suggestions for/problems with outings</b>	3	(3)
<b>Suggestions for/problems with monthly talks</b>	3	(3)
<b>Need to involve/talk to members</b>	2	(2)
<b>Other</b>	6	(6)
<b>Total</b>	106	

(\* **Note:** Some respondents gave multiple responses)

By far the majority of comments made in response to this question expressed **satisfaction with the existing arrangements** (almost half of those who made comments):

"A wonderful source of stimulation and additional interests - indeed, further development in mature years! Thank you!" (F, 65-9)

"It's great as it is, catering for so many different tastes and hobbies. Very impressive!" (F, 80-4)

"The range of courses is fantastic. I wish I had time to attend more! Well done." (F, 65-9)

"It is as good as it gets!!!!" (F, 90-4)

"Merton is very well run!" (M, 65-9)

"You do an excellent job, leading to expanding membership and many varied groups - Merton U3A offers something for everyone, so keep to the successful formula and well done!" (M, 80-4)

**Seventeen respondents made suggestions for types of activities, courses or talks:**

"Short intensive 'tester' courses to introduce one to subjects before committing to full-time groups and which might encourage new groups to form." (F, 80-4)

"Courses on improving computer skills would be very helpful. I taught myself PowerPoint in order to do U3A presentations but am at a very basic level of competence." (M, 65-9)

"Coffee mornings back at Drake House rather than members' houses that are off bus routes and need to be found and walked to." (Gender unspecified, 75-9)

"Similarly to lunches for e.g. new members, do lunches to bring together groups who do similar topics/activities to exchange ideas." (F, 60-4)

"Occasional combined projects between say Merton and Kingston groups, e.g. exhibition of paintings, photography, needlework, competitions of Scrabble, bridge etc or presentation of creative writing etc." (F, 70-4)

"More specialist social events such as the 'Now You Has Jazz' event in October by the JAG." (M, 65-9)

"I would be interested in talks of old stars, shows, entertainment etc. Maybe group bookings for West End shows or Wimbledon Theatre." (M, 70-4)

"Would like formal lectures re modern history, Classical Greece, Near East (Mesopotamia etc BC), Archaeology, Anthropology. Disappointed no one available to take up these subjects." (F, 80-4)

**Ten people made suggestions or referred to problems with existing groups:**

"Why the assumption that everyone's on holiday in August (last month I'd choose)?" (F, 70-4)

"Provision of large scale local maps showing transport routes to assist new members visiting private homes for group meetings." (F, 80-4)

"Too many meetings clash - such as on a Thursday afternoon!" (F, 85-9)

"... occasionally groups are described as 'beginners' and then go on to indicate that they actually don't want beginners! Surely 'beginners' should include those that have no knowledge of a subject but are interested in learning." (F, 65-9)

"Help with mobility and getting to groups always welcome for many of us." (F, 90-4)

**Eight respondents reflected on the fact that Merton U3A did not adequately reflect the characteristics of Merton's population:**

"... it seems to be 100% white membership. I know there are some moves to engage Mitcham residents and the committee could develop a more active strategy to widen its membership to reflect the population of the *whole* borough." (F, 65-9)

"Extend activities to Mitcham to offer Mitcham residents the same sort of activities and interests as U3A provides in Wimbledon." (F, 75-9)

"There is an impression that Merton U3A is overwhelmingly Wimbledon dominated with only token nods towards the Mitcham/Colliers Wood side of the borough. More effort should be made to stress that it's borough-wide, but I don't know how this could be done." (M, 60-4)

"Better gender balance and more newly-retired (the current membership seems a bit elderly)." (F, 65-9)

"Encourage younger people (50/60) to join U3A." (F, 75-9)

**Six people made suggestions relating to membership renewal or cost:**

"Now there are more members joining U3A, how about considering decreasing the fees from £12-£10?" (F, 75-9)

"Membership renewable at lectures - saves postage." (M, 60-4)

"An option for those digitally connected to fill in forms electronically and return them electronically. An option to renew by Direct Debit automatically - ceases on death. I could try to develop .pdf forms which would be electronically fill-in-able. I have done this for myself before. Happy to do this with your team!" (M, 70-4)

"Pay membership renewal through group leaders and keep costs down for all. And help in not paying in time (forgetting date!)" (Gender unspecified, 65-9)

"Maybe enable payment other than by cheque?" (M, 60-4)

**Five respondents commented on the increasing size of Merton U3A's membership:**

"Decide what is upper limit of number of members, beyond which a second Merton U3A would be formed." (M, 65-9)

"Merton U3A is getting very large and perhaps less welcoming to new comers and less accessible. Should we be thinking about geographical division? Some groups are already duplicating but more than previously have to hire public spaces which makes groups less personal and friendly." (F, 90-4)

"Fine at present but at some stage the Committee will have to consider whether changes are needed to meet the increasing size of membership, whether keeping



very large numbers (like Harrow, Bromley and London U3As which have about 1,500) or by setting up a new or a satellite U3A." (F, 80-4)

**Five people made comments relating to Merton U3A's newsletter:**

"Please keep sending Newsletter in hard copy." (F, 65-9)

"I think the newsletters are excellent - lots of information and ideas." (F, 65-9)

"Emailing the newsletter as you are will cut labour enormously so great news." (F, 70-4)

"Continue switching mailing to email as you are doing to save on costs." (M, 60-4)

"Hope there will be an email reminder that the newsletter is now available online (i.e. a reminder when each newsletter is ready to see)." (F, 65-9)

**Four people referred to publicity:**

"Publicity to attract a more diverse membership." (F, 85-9)

"Social media for publicity." (F, 65-9)

"Why not use free advertising in local newspapers?" (F, 70-4)

"More publicity about joint events with other U3As." (F, 65-9)

**Three people had suggestions for new groups:**

"A storytelling group." (M, 65-9)

"Natural History Group? Yoga... Garden history group... Archaeology group... Crossword group? Conservation group?... Food group, Christmas decoration group, short break group." (M, 60-4)

"More groups that present material by tutor, and don't expect much prior preparation from participants, e.g. Shakespeare Explored, History, Architecture, yet are academic." (F, 75-9)

**Three people offered suggestions for or referred to problems with outings:**

"I have attempted to join a couple of groups/outings but received no response." (F, 55-9)

"The majority of group meetings, and outings, etc, give a telephone number - it would be good if *even more* could do so bearing in mind some people do not have access to/cannot use Internet." (Gender unspecified, 60-4)

**Three people raised issues relating to monthly talks:**

"A different venue, one with windows, as air-conditioning makes me cough! And I get dirty looks from other members which puts me off going to the talks which I thoroughly enjoy." (F, 80-4)

"Reduce the heat in the Drake House meeting room!" (F, 55-9)

"How about asking audience to complete evaluation forms following speakers on Friday afternoons (and other events too perhaps)?" (F, 70-4)

**Two people commented on the need to involve or talk to members:**

"Involving members more." (F, 80-4)

"You need *Discussion* with committee members about all these matters. Questionnaires are always useless. You need more and better groups which expand our experience. This means you need LEADERS with IDEAS. You should be an IDEAS FACTORY like the BBC always devising new, original programmes. You have a diverse membership - *seek out the potential and talk to them*. Personal contact face-to-face is essential. Don't use committees." (M, 80-4)

**Other comments (made by one member only) included:**

- Request for AGM to be moved to a different day of the week
- Training for group leaders
- More hearing equipment
- Support needed for Wimbledon Guild Drake House Club meetings.

**Four respondents felt unable to comment as they had not been members of MU3A for long enough.**

## **5 Discussion**

### **5.1 Characteristics of respondents**

#### **5.1.1 Age and gender**

The 'over-feminisation' of U3A has been noted in previous research on the organisation's membership (see, for example, Williamson 2000; Hebestreit 2006; Formosa 2012; Third Age Trust 2013). The percentages of men and women who

completed a questionnaire were representative of the total membership of U3A at the time, with one fifth of those who indicated their gender being male.<sup>2</sup>

Almost three-quarters of those who gave their age said they were between 60 and 79 years old, with most of the rest being older than this and very few being below 60. This pattern is broadly similar to the ages of U3A members recorded in research undertaken by the Third Age Trust in 2001 (Third Age Trust 2013), although responses to the questionnaire would indicate that a slightly higher proportion of MU3A members were 80 or more than was the case in the previous research.

The general impression that U3A attracts mainly older retired people is only partially supported as 43% of those who gave their age said they were 69 or younger.<sup>3</sup>

### **5.1.2 Ethnicity**

Formosa (2012) noted from his research that ethnic minority groups were under-represented in the U3A movement and this is borne out by the MU3A survey. Census statistics for Merton (Ware 2013: Appendix 1.6) show that in 2011, 74% of the over-50 population and 78% of the over-65 population indicated that they were White (Ware, 2013) but the proportion of respondents to the MU3A survey who said they were White was 95%. While it is important to bear in mind the possible bias in survey response, it appears that there is likely to be real cause for concern over the extent to which MU3A represents the older population of the London Borough of Merton in terms of ethnicity.

### **5.1.3 Disability**

Just under a quarter of all those who returned the questionnaire (99 respondents) indicated that they had a disability affecting their participation in U3A, with the most frequently mentioned disability relating to mobility. This needs to be borne in mind in choosing venues for future activities. Advice from the Third Age Trust notes that members' homes "tend not to be accessible" while outside accommodation will "ideally be accessible to all" (Third Age Trust, 2011).

### **5.1.4 Educational qualifications**

Previous research has suggested that members of U3A are relatively well educated in comparison with the general population (Midwinter 1986; Hebestreit 2006) and the current research supports this. Almost a third of respondents (32%) indicated that they had an undergraduate degree, and nearly a fifth (18%) said that they held a post-graduate degree.

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<sup>2</sup> This has increased slightly since the survey

<sup>3</sup> The Government generally defines 'older people' as 65 +

### **5.1.5 Employment status**

Since U3A is an organisation for people who are no longer in full-time work, it is not surprising that the vast majority of respondents (87%) indicated that they were retired, with similar proportions of men and women no longer being in full-time work (women 86%: men 85%).

## **5.2 Becoming a member**

### **5.2.1 Sources of information about U3A**

In a previous study undertaken in 2001 (Third Age Trust, 2013) the most frequent source of information was word of mouth (73% of respondents had found out about U3A in this way). This was supported by the Merton survey, with 'friends' being by far the most frequently mentioned source of information (63% of people who answered this question cited this source), a further 6% citing relatives and 1% citing 'word of mouth'. It is helpful, in terms of designing future publicity, to know that word of mouth is the main source of information on U3A. However, it should perhaps be borne in mind that - as observed by Wright (2013) - this form of information transmission may lead to people with similar characteristics being attracted to join U3A and this could represent a challenge to attempts to make MU3A more truly representative of Merton as a whole.

The second most frequently mentioned source of information was a library, and only very small numbers of respondents said they had obtained information via the media (Internet, newspapers, magazines and advertising). Although at present very few people join as a result of information found on the Internet, it is possible that this will change over time as cohorts of people more accustomed to seeking out information electronically reach the Third Age. Wright (2013) observes that a wider range of media techniques is available to U3A today than was the case 20-30 years ago and new avenues are there to be explored.

Although it was not offered as a response on the questionnaire, 14 respondents said they had heard about U3A at the annual Wimbledon Fair, showing that at least some of those members of the public who obtain information at the fair go on to become members.

Men were significantly more likely to cite relatives as a source of information and the most frequently mentioned relative was a wife, which lends some support to the suggestion that men's social lives tend to revolve around those of their spouses.

### **5.2.2 Reasons for joining U3A**

Previous research has suggested a variety of reasons given by U3A members for joining the organisation, including a desire for social contact, a desire to acquire knowledge or new skills, a desire to maintain an active mind and a desire to meet people with similar interests (Third Age Trust 2013; Hebestreit 2006). In her research on Australian U3As, Hebestreit found that the most frequently given first

choice of reason for joining was 'to gain knowledge' (70.2%), followed by 'personal satisfaction' (17.1%), 'to mix with stimulating people' (8.7%), 'curiosity' (1.9%), 'to make new friends' (1.3%) and 'to escape daily routine' (0.8%).

The MU3A study replicated Hebestreit's question on reasons for joining and found that a very similar proportion of members (69%) chose 'to gain knowledge' (as in Hebestreit's study, this was the most frequently chosen reason). Hebestreit reported that men were slightly more likely than women to give 'personal satisfaction' as a reason for joining and women slightly more likely to say they joined 'to make new friends' but these differences were not statistically significant and could be chance effects. In the MU3A study, women were significantly more likely than men to say they had joined U3A 'to make new friends'.

### **5.3 Participating in U3A**

#### **5.3.1 Preferred methods for learning**

Hebestreit's Australian research found that 37% of U3A members expressed a preference for small, informal groups, while 28% preferred traditional classroom settings (Hebestreit 2006).

In the MU3A research, 'learning informally in a group that meets regularly' was the most popular way of learning for both men and women, with 76% of all who answered this question saying that they would like to learn in this way. This was followed by attending talks and attending group meetings, with online learning being much less popular. Women were especially likely to opt for talks or group visits, but the research suggests that the current focus on relatively informal meetings is acceptable to the majority of members. As with sources of information (see 5.2.1), preferences for online learning may increase in the future.

#### **5.3.2 Preferred venues for learning**

Hebestreit's research on Australian U3A members found that, while private homes were the most frequently used venues for meetings, they were not the most popular choice with only 0.5% of respondents choosing 'private homes'. Hebestreit reports that men were slightly more likely than women to prefer traditional classroom settings, but this difference was not statistically significant so could be due to chance (Hebestreit 2006). In the MU3A research, meeting in members' homes was the most popular choice for both men and women, with just half of those who answered this question choosing this option and one third saying they had no preference. The second and third in popularity were hired space (e.g. hall, room, workshop, sports facility) and a free public space (e.g. library, park).

It appears that meeting in private homes is more acceptable to members than other venues, but clearly, some venues are more suitable for certain activities than others (see comment in paragraph 5.1.3 concerning accessibility).

### **5.3.3 Availability to participate in U3A activities**

Most current MU3A meetings are held during the day on weekdays, and this is clearly when most members are available, with 95% saying that they are available at these times. However, weekday evenings and weekends were both possibilities for over a third of respondents and it may be useful to bear this in mind in planning future events.

### **5.4 Suggestions for improving Merton U3A**

It is pleasing to note that almost half (48%) of those who gave comments in this section had positive things to say about the current organisation. There were plenty of suggestions for improvement but very few criticisms. One must, of course, bear in mind the possibility that some MU3A members who did not return the questionnaire did not feel sufficiently engaged with the organisation to respond to the request for information, and that they might have had grievances or criticisms which had caused them to dissociate themselves from the organisation. However, it was encouraging that a quarter of those who did respond had comments to make and that these more often reflected satisfaction or desire to make constructive suggestions for improvement than criticism or negativity.

## **6 Limitations of the survey**

The results of the current survey need to be considered in the light of the following:

- Approximately half of those to whom the questionnaire was sent (current MU3A members) did not return the questionnaire. It is possible that these individuals were significantly different from those who did return the questionnaire in terms of important variables such as age, ethnicity, satisfaction with MU3A, disability (e.g. eyesight) or educational level.
- Some key questions were not answered by relatively high numbers of respondents. Thus 49 (12%) people failed to indicate their gender.

Despite these limitations, it is felt that the response rate (49%) was quite acceptable for a survey which asked individuals to provide personal information (albeit anonymously).

## **7 Concluding comments: The wider context**

The MU3A survey has demonstrated that it is possible to obtain useful information on U3A members by asking them to complete a short questionnaire. The information given and suggestions made for improvement will be extremely helpful in directing the MU3A Committee's future efforts in terms of recruitment, development of activities, scheduling of events, making improvements to existing activities and targeting under-represented groups.

It is hoped that the information obtained and the methods used will be of interest to other U3A groups in the UK (and possibly in other countries) and will encourage them to seek similar information on their own members.

The questionnaire used for the MU3A survey was designed to a tight time-schedule so that it could be enclosed with a planned mailing. The results of the survey provided clear indications of potential for improvement of the questionnaire in future surveys and information on this can be passed on to any U3A groups interested in undertaking their own membership survey.

Wright (2013) draws attention to concern at a national level about lack of diversity in U3A's membership and highlights a need to identify barriers that prevent people joining. The current survey was restricted to people who are currently members of U3A, so it does not reflect the opinions of people who have never joined or who have left the organisation. External market research could be helpful in providing information on why people who are eligible to join do not do so and internal research could help to illuminate the reasons why some people choose to discontinue their membership.

Repeating this survey (perhaps every two to three years) would be helpful in monitoring changes in membership characteristics and assessing the impact of any policy or operational changes (e.g. marketing, course development, venues etc).

## 8 References

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## 9 Contact Details

For further information on the MU3A survey please contact:

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## **10 Appendix 1: Notes on statistical significance**

In an attempt to identify differences in their needs and interests, comparisons are made in this report between responses given by men and women and between responses given by people in different age groups. Differences (e.g. in the proportions of men and women giving different responses) may appear to be meaningful, but care needs to be taken in interpreting them as differences often occur by chance.

The level at which one decides that chance is unlikely to explain a difference in results obtained from two or more groups is arbitrary, but there are standards which are used throughout science. If the pattern of results is such that it would only be found one time in twenty by chance, then it is more likely that a real effect is occurring than that the results are due to chance alone (statisticians refer to this as a significance level of ' $p < 0.05$ ' where  $p$  denotes probability). If the pattern of results is one that might occur one time in a hundred by chance alone ( $p < 0.01$ ) then chance is even less likely to be an explanation.

Chi-square tests are used to calculate the likelihood of a result occurring by chance alone. Where there appears to be a difference between groups but the Chi-square test shows that it is 'not significant' care needs to be taken in discussing the result as the possibility of its occurring by chance is relatively high.

## **11 Appendix 2: Merton U3A Questionnaire**

The 2013 membership survey questionnaire is shown overleaf.



**MERTON U3A**

Registered Charity No 291074

**MEMBERSHIP SURVEY JULY 2013**

Participation in this survey is totally voluntary. Any information you choose to provide will be treated in strictest confidence and analysed anonymously. Information about the membership is useful in planning activities and resources according to the varied requirements of members. Your response to this survey would be much appreciated.

**1. How did you hear about us?** Friends/ Internet/ Library/ Other (please specify)

.....

**2. Reason(s) for joining:**

- |  |   |
|--|---|
| <input type="checkbox"/> Curiosity             | <input type="checkbox"/> To mix with stimulating people |
| <input type="checkbox"/> To gain knowledge     | <input type="checkbox"/> To escape daily routine        |
| <input type="checkbox"/> Personal satisfaction | <input type="checkbox"/> To make new friends/           |

Other (specify):

.....

**3. Highest educational qualification** (please tick)

- |   |   |
|---|---|
| <input type="checkbox"/> No formal education                | <input type="checkbox"/> College diploma or certificate |
| <input type="checkbox"/> School leaving certificate (15-18) | <input type="checkbox"/> Undergraduate degree           |
| <input type="checkbox"/> Vocational qualification           | <input type="checkbox"/> Postgraduate degree            |
| <input type="checkbox"/> Other (specify):                   |   |

**4. Preferred method of learning:**

- |  |  |
|--|--|
| <input type="checkbox"/> Attending talks                                       | <input type="checkbox"/> Online learning course, with others |
| <input type="checkbox"/> Attending group visits                                | <input type="checkbox"/> Online learning course, alone       |
| <input type="checkbox"/> Short course with formal structure                    | <input type="checkbox"/> Other                               |
| <input type="checkbox"/> Learning informally with a group that meets regularly |  |

**5. Preferred venues for learning:** Different activities require different types of venue, but we're trying to establish whether there's a preference for continuing to meet in private homes or other places (while keeping costs as low as possible)

- |  |  |
|--|--|
| <input type="checkbox"/> In members' homes                                     | <input type="checkbox"/> Free public place e.g. Library/Park |
| <input type="checkbox"/> Café/restaurant/pub                                   | <input type="checkbox"/> No preference                       |
| <input type="checkbox"/> Hired space e.g. hall/room / workshop/sports facility | <input type="checkbox"/> Other                               |

**6. Employment status:** Retired/Working full-time/Working part-time  
(please circle)

**7. Availability to participate in U3A activities:** Mon-Fri daytime/evening; Weekend  
(Please circle)

**8. Gender:** (please circle) Male/Female

**9. Age** (please circle)

Under 50	50- 54	55- 59	60- 64	65- 69	70- 74	75- 79	80- 84	85- 89	90- 94	95- 99	Over 100
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**10. Do you have a disability affecting participation in U3A?** Please tick:

<input type="checkbox"/>	Mobility	<input type="checkbox"/>	Hearing	<input type="checkbox"/>	Other
<input type="checkbox"/>	Sight	<input type="checkbox"/>	Speaking		

**11. Ethnicity:** Tick the option that best describes your ethnic group or background

<input type="checkbox"/>	White British	<input type="checkbox"/>	Black British/ Black African/ Black Caribbean or other Black background)
<input type="checkbox"/>	White other	<input type="checkbox"/>	Other ethnic group
<input type="checkbox"/>	Asian British/ Asian	<input type="checkbox"/>	Mixed ethnic group

**12. Is English your first spoken language?** Yes/No

If no, please give your first spoken language(s):.....

**13. Suggestions for improving Merton U3A:**

.....  
.....  
.....  
.....  
.....

**RETURNING THIS FORM:**

To save postage, you may choose to return this survey with your Application/Application Renewal form. You may also choose to return it separately to guarantee anonymity.

Please send to: Susan Gregory, Merton U3A Membership Secretary,  
130 Carshalton Park Road, Carshalton, Surrey SM5 3SG  
If you have any queries, please contact Sue on: 020 8395 8615