MEN AND U3A

Catherine Ware
Merton U3A
July 2013

1. **Introduction**

2. **The problem/why should we be concerned?**

3. **What do we know about the over–fifties population of Merton and neighbouring areas?**
   - i.   Demographics
   - ii. Marital status
   - iii. Migration and diversity
   - iv. Qualifications
   - v.   Employment status
   - vi. Retirement
   - vii. Deprivation

4. **What do we know about men in Merton U3A?**
   - a) Membership
   - b) Demographics
   - c) Participation

5. **What do we know about men in other U3As?**
   - a) Neighbouring U3As
   - b) U3A at national level
   - c) U3A internationally

6. **What do we know about other organisations?**
   - i.   Workers' Education Association
   - ii. Open University
   - iii. MensSheds

7. **Factors affecting learning/leisure activities of older men**
   - i.   Psychosocial issues
   - ii. Life expectancy, retirement and Third Age
   - iii. Socio-economic issues/Social Class
   - iv. Learning issues
   - v.   Leisure issues
   - vi. Institutional issues

8. **Conclusions**

9. **Further information required**
   - i.   Data about Merton U3A members
   - ii. External research

10. **Suggested interim actions**

11. **Next steps**

12. **References**

Appendices (separate document)

1. INTRODUCTION

During the summer of 2012 Merton U3A's Committee asked a small working group of members to review our existing communication resources and methodologies, identify areas for improvement, and make recommendations for more effective communication with members and the community.

It was agreed that, whilst the organisation was thriving with over 800 members, there were particular concerns that some groups in the community — men, residents of the eastern part of the borough, and ethnic minority groups — seemed to be under-represented in the membership. In order to develop a strategy, we needed to investigate the degree and reasons for any under-representation. This investigation into the gender imbalance has also shed some light on the other areas of under-representation.

Our research began with the under-representation of men in Merton U3A, but in order to determine how we compare with other U3As, we contacted neighbouring U3As within the Surrey Network and London Region network to which we belong, and found that we were not alone in our concern — in fact, as our research progressed, it transpired that male under-representation is a concern not only throughout U3A but also in other organisations focused on older people, and adult education, so this paper also draws on contributions from national and international sources.

We are very grateful to the U3As in Surrey and London that have shared data with us so far, and for the support we have received by email, telephone and in person from individual members including founding members Dianne Norton and Audrey Cloet who contributed valuable historical insights. Ian Searle explained developments in online courses. Gwen Wright and Janet Whitehouse on the National Executive Committee have also provided support and an interest in taking this research further. The names of other personal contributors are also given with the references at the end of this paper.

In order to put U3A into context and investigate whether there were particular issues that differentiate U3A from other learning and leisure options for men, we also conducted a literature review and contacted some other organisations. We have had helpful correspondence and conversations with several members of the Association for Education and Ageing, to whom we are very grateful, and we have drawn heavily on contributions from Jim Soulsby and Marvin Formosa. Valuable contact has also been made with Sara Arber at the Centre for Research on Ageing and Gender at the University of Surrey, and Andrew Lewis at the Open University. The names of other personal contributors are also given with the references at the end of this paper.

This paper also includes a literature review of English-language sources with some analysis of recent UK census data. Our research has focused on the UK and countries that have adopted the British U3A model based on self-help voluntary groups (rather than the original French model that is driven/supported by higher education institutions). Main references are given at the end of this paper.

Charts and maps convey a lot of information but have been put into a separate document of Appendices so that it's easier to refer to them alongside while reading the main document.

The conclusions and recommendations are intended to assist with forward planning at Merton U3A, and include ideas for collaboration with other U3As and other organisations. While the focus of this research has been to identify issues relating to the under-representation of men in Merton U3A, we feel that some of our findings have broader implications, not only for the U3A movement, but also for older adult education in general — but that is for others to take forward at national level.

2. THE PROBLEM/WHY SHOULD WE BE CONCERNED?

a) Men are significantly outnumbered by women in Merton U3A, and this is thought to be off-putting and self-perpetuating. The Committee has become aware that men are occasionally made to feel unwelcome, but women have also expressed unease about the gender imbalance. U3A is missing out on what men could contribute socially and intellectually, and there is some concern that men may be missing out on what they could gain from U3A.

b) U3A aims to be inclusive, but the gender balance in Merton U3A is not representative of the demographic situation in Merton. It appears that U3A is not attractive to men, but we need to understand the reasons for this and assess whether there is an unfulfilled market need, and if so, what can be done about it.

c) The 'baby boomer' generation is now retiring, and the life expectancy of men is rapidly catching up with that of women. If the organisation is to thrive, we need to be able to meet the requirements of this younger generation of men which are different from those of older generations, and we can expect greater numbers of men who will also be active for longer.

3. WHAT DO WE KNOW ABOUT THE OVER-FIFTIES POPULATION OF MERTON AND NEIGHBOURING AREAS?

a) Demographics

Older people: According to the 2011 Census statistics (ONS 2013a), the average age of Merton residents is 36 years (compared with 36 years across London, and 40 years nationally). There are currently about 199,700 Merton residents with 26% in the over-fifties age bracket, and 11% over 65 years (compared with 11% across London and 16% nationally). The drop between the over-50s and over-65s doesn't necessarily mean that people have died in the intervening 15 years, but reflects the post-war baby-boom — this is clearly shown in the population pyramids Appendix 1.4 (a-d).

By 2035 the population projections for Merton indicate that the over-50's will rise to 32% of total population and the over-65's will rise to 15% (compared with 14% across London and 23% nationally). (ONS: 2010 Subnational Population Projections by sex and five year age groups Table 2c.)

The population pyramids also show that London has a younger profile than Surrey and the UK in general. However, the map in Appendix 5.2.2 shows that the Outer London boroughs have a generally older population than Inner London. Within southwest London all boroughs have slightly higher percentages of people aged 50+ and 65+ than Merton or Wandsworth. Merton's profile matches the London average and Wandsworth is younger still, but north east Surrey has a significantly higher percentage of older people (37% and 18%). See Appendix 2.1 for more detailed data on total population and %men aged 50+ and 65+ in each borough of London and Surrey.

Within Merton, older people tend to be concentrated more toward the west of the borough (especially Village, Raynes Park, Cannon Hill), with the eastern wards (excepting Cricket Green) having a younger population. See maps in Appendix 5.1.1. for distribution of people aged 65+ in Merton and in Appendix 5.4.1. for Surrey.

Older men: In Merton, men currently account for 46% of both the 50+ and also the 65+ age groups. See Appendix 2.1. The difference between the sexes really starts to show in the over-eighties with men accounting for only 37%, and only

27% amongst the over–nineties. (Interestingly, the percentage of men in Merton's 90+ population is lower than the London average (33%), Croydon (40%), and several Surrey boroughs. See Appendices 1.1 to 1.3.

By 2035, the percentage of men in Merton in the 50+ age bracket will rise to 49% and the percentage over 65 will remain at 46%. The predicted percentages of men in the over-nineties in Merton will rise to 40%. See Appendix 1.2 & 1.3. Compared with 2011, this indicates a significant improvement in the longevity of men in Merton in years to come, and this is in line with regional and national predictions as illustrated in Appendix and the population pyramids in Appendix 1.4(a-d). Despite the closing gender gap however, London (and Merton) will continue to have relatively fewer older people than Surrey and the UK.

b) Marital status

Statistics indicate that in mid-2010, 48.2% of the total adult population in England and Wales were married, 35.6% were single, 9.3% were divorced, and 7.0% were widowed. See the population pyramid in Appendix 1.5.1. The trend has been toward a decline in numbers who are married and widowed, and an increase in those who are single and divorced. The differences between the marital status of men and women are most apparent in older people because there are more widows than widowers — partly because men have had a lower life expectancy, and partly because women are typically married to an older spouse. However, between 1971 and 2010, the proportion of widows *de*creased twice as much as the proportion of widowers because male longevity has increased more than women's — and this trend continues.

The proportion who are divorced increases between 40-50years, currently peaking at 53 years (17.6%). There has been a significant increase in divorces since the Divorce Reform Act in 1971, and the vast majority are initiated by women. There are more divorced women than divorced men, possibly because divorced men remarry more than divorced women. At the age of 50, there are about 8% single men and 6% single women in the population. These percentages virtually halve by age 60 and continue to decrease with age, but a 2% difference between the sexes continues until around 80+years when the proportion of single women increases as men die off.

Appendix 1.5.2 provides geographical data for marital status for all residents aged over 16years (based on local authorities). Although there is no differentiation by age or gender, it clearly shows that there are many more married people in Surrey (52.6%) than in London (39.8%). Not surprisingly, there are more married couples in the boroughs of Outer London (45.7%) than Inner London (31.2%). Surrey (8.1%) also has more divorced people than London (7.4%), and there are more widowed people living in Surrey (6.7%) than London (5.0%). The highest percentage of single people live in Inner London (53.5%), which is well above Outer London (37.8%) and Surrey (30.1%). The picture in Merton is somewhere between Inner and Outer London: Married (44.9%), Divorced (6.9%),
Widowed (5.1%), Single (40.2%)

c) Migration and diversity

Merton is ranked as the 24th most diverse borough in the country. According to the 2011 Census, only 48% of Merton residents classified themselves as 'White British' (English/Scottish/Welsh/N.Irish), This compares with 45% across London, 84% in Surrey, and 81% nationally. Over 60% of Merton residents are Christian, with about 5% Hindu, 6% Muslim, and 17% not religious.

Appendix 1.5 provides a breakdown of ethnic groups in Merton as a whole, as well as percentages amongst the over-50s and over-65s. (Unfortunately there is not yet a reliable breakdown by age group and gender). The table clearly shows

that there are more 'White British' in the older age brackets (63% of over-50s and 68% of over-65s). There are also more Irish amongst the older population.

According to the 2011 Census, 'Black and Asian Minority Ethnic' (BAME) groups totaled 35% of Merton's population (compared with 40% across London and 13% nationally). (GLA 2013). The table in Appendix 1.5 shows that whilst the proportion of people classified as Indian has remained fairly stable (around 4%), the older age groups have slightly more residents classified as Black Caribbean (5%). Data for the general population of Merton reflects greater ethnic diversity amongst younger age groups.

The majority of 'White British' live in the west and south of the borough while the east of the borough is more diverse. (GLA 2013) The majority (62%) of Merton's population was born in the UK (compared with 63% across London/ 87% nationally) — most people in the west and south of the borough were born in the UK. The greatest concentrations of those born abroad are in the east of the borough, especially wards such as Graveney (54%) and Figges Marsh (50%). The largest migrant populations by country of birth are currently from Poland (3.5%), Sri Lanka (3.2%) and South Africa (2.8%).

For London maps on migration and ethnic diversity see maps in Appendices 5.2.5 and 5.2.6. For maps on ethnic diversity in Surrey see maps in Appendix 5.4.4.

Although the population of London is growing, there has been a steady net outward migration from London to other parts of the UK (mainly South East and East of England) over the past decade. See map in Appendix 5.2.5. Merton statistics show a net outflow of people aged 45+. (ONS 2011)

d) Qualifications
In Merton, 41% of all residents aged 16 and over have Level 4+ qualifications (i.e. post A-Level), compared with 38% across London and 27.7% in England and Wales. (Merton ranks 12th in England and Wales). Wards with the highest percentage of highly qualified residents are in the north and west of the borough. Merton residents with no qualifications amount to 15%, compared with 18% across London and 22.7% in England and Wales. Residents in the eastern part of the borough tend to have lower/no qualifications.

The 2011 Census statistics indicate that, overall, there are more residents of Inner London (45%) with Level 4+ qualifications than residents in the outer London boroughs (33%) or Surrey (36%). See Appendix 3, and also maps in Appendix 5.1.4. This looks like an anomaly, given that statistics also show Surrey and the Outer London Boroughs to be relatively more prosperous.

The reasons for the situation noted above may lie partly in the fact that, despite relatively high levels of deprivation, Inner London has a younger population including young people moving to London for work after graduation. The population of Outer London and Surrey is generally older, and despite being more prosperous, older residents are less likely to have had such access to higher education. Further investigation is required into the qualifications held by older age groups and gender, and hence the implications for U3A.
(ONS 2013a; London Borough of Merton 2010; Greater London Authority 2012)

e) Employment status
The National Statistical Office analyses employment by type of occupation in several ways, but the hierarchical categories of the Socio-economic Classification (NS-SeC) are most commonly used to define 'social class' (debatable though this may be). See Appendix 4.1 for a top-level comparison between London, Merton and Surrey (data available by gender and Local Authority, not by age).

According to the 2011 statistics, most people in London and Surrey fall into Category 2 'Lower managerial, administrative and professional occupations'. Existing statistics indicate that this is the category from which most U3A members are drawn. Women take the lead in in this category in Surrey (Women 28%/ Men 25%) and Merton (Women 26%/Men 23%).

However, men take the lead in category 1 'Higher managerial and administrative and professional occupations' with the highest scores in Surrey (Men 22%/Women 11%) and Merton (Men 19%/Women 13%). Men also score highly in the category of 'Small employers and own account workers' — 15% in Outer London, and 14% in both Surrey and Merton (compared with 6-7% everywhere for women).

f) Retirement

The 2011 Census data indicates that there is a significant difference between Inner London/Outer London and the rest of the country with regard to the proportion of both men and women who are economically inactive due to full 'retirement'. The gender differences also increase with distance from Inner London. Compare Inner London (Men 5.3%/Women 7.2%) with Outer London (Men 8.4%/Women 11.3%) and Surrey (Men 11.0%/Women 14.8%). The Borough of Merton (Men 7.3%/Women 10%) lies between Inner and Outer London. See Appendix 4.5

Unfortunately the published datasets do not yet provide detailed breakdowns for retirement by gender and age for each borough. There is growing evidence of both men and women working beyond their respective retirement ages. The ONS 'Older Workers Statistical Information Booklet' (DWP 2012) indicates that the South East (14.1%) and London (14.1%) are the regions with the highest proportion of workers amongst the pensionable population. "This may reflect the higher cost of living and the greater variety of jobs in London… additionally, there tends to be a migratory drift out of London for the older population post retirement, such that a higher proportion of those remaining are more likely to be economically active".

See also para 7.b) for further analysis of Life expectancy, retirement and Third Age.

g) Deprivation

The government's Indices of Multiple Deprivation (IMD) measure income, employment, education/skills/training, health/disability, housing, transport and other factors affecting quality of life. The higher the IMD score, the higher the deprivation. Within Merton, there is a clear difference between the more prosperous west, and the more deprived east. In the western wards of Merton there are more people with higher education and drawing higher incomes from employment in managerial and professional occupations. In the eastern wards there are more people with lower or no qualifications, employed in more routine work, or unemployed. See map in Appendix 5.1.2 Deprivation in Merton by wards

The SW corner of London and neighbouring boroughs in Surrey are amongst the least deprived in the country, but the London boroughs have more deprivation than those in Surrey. The boroughs and districts in Surrey are more homogeneous with relatively little deprivation except in pockets, but the boroughs closer to central London (Croydon, Sutton, Wandsworth and Merton) are more mixed, with higher average levels and extent of deprivation.
See maps in Appendix 5.2.4 for deprivation by boroughs and districts in Greater London; 5.3.2 for deprivation in Southeast England; and 5.4.3 for Surrey.

4. WHAT DO WE KNOW ABOUT MEN IN MERTON U3A?

a) Membership

By the beginning of 2013, the membership of Merton U3A had reached over 800. Men currently constitute around 20% of our membership. Although the number of men has increased slightly amongst members joining in the past 6 months, this has not significantly affected the overall percentage.

b) Demographics

We do not currently collect demographic data about our members. We therefore have no basis for analysis of factors such as age, marital status, employment (past/present), educational experience, leisure interests/other activities – all of which, as indicated in the literature, are relevant to the take-up of learning/leisure activities in later life. An understanding of our demographic profile might help us to understand when and why men and women choose to join U3A, or why they do not do so.

Address data does, however, indicate that the majority of our members live in the western part of the Borough of Merton, and that we struggle to attract members from the eastern wards. The pattern of U3A membership broadly coincides with borough statistics on the location of older residents who are largely White British and born in the UK. Residents in the western parts of the borough also tend to enjoy higher levels of education, employment in management and professional occupations, and low levels of deprivation. Further data is required by age and gender at ward level in order to get a more accurate picture on all the issues.

c) Participation

We do not currently collect data about reasons for joining/leaving. (We used to write to leavers, and most gave their reasons as "moving from area" or "illness/loss of mobility"). We do not analyse those attending talks, visits or social events. Our data on group membership, based on application renewals, is currently not comprehensive or reliable. Existing data suggests that about 60% of men belong to activity groups, and they participate in about 50% of the available groups. The groups that currently seem to be most popular with men in Merton U3A are Table Tennis and Current Affairs, followed by 'A Year in History', Greek Playreading, languages (French/Italian), Bridge, Chess and Philosophy.

Men currently constitute about 20% of our Committee, but they are punching above their weight when it comes to group leadership — there are 22 male Group Leaders leading 26 activity groups (29% of the total number of groups).
More accurate data on all members is required, however, in order to get a better understanding of the level and range of participation of both genders.

5. WHAT DO WE KNOW ABOUT MEN IN OTHER U3AS?

a) Neighbouring U3As

To get an idea of how Merton U3A compares with others, we started by contacting neighbouring U3As in SW London and the Surrey Network for data on their male membership. Curious about the higher percentages in Surrey compared with London boroughs, we then began the process of collecting the same data for U3As across the London region. This was welcomed by other U3As which were also concerned about the under-representation of men. Whilst the exercise is not yet complete, it is evident from the data received so far that the U3As in Greater London (22% average) consistently have lower percentages of men than those in the Surrey Network (31% average).
Appendix 2.1 is a composite table that provides data about U3As and older people in each borough. While the U3A and borough boundaries are not always

contiguous, they have been mapped as accurately as possible. The further one goes away from the centre of London, the higher the percentage of male members. The following are in the lead so far on male membership: Barnet (38%); Horsley (37%); Caterham (36%); Leatherhead (35%); Ashstead, Bookham, and Fetcham (34%); Sidcup (30%); Havering (28%); Orpington (27%); Bromley (26%); Richmond, Sutton, Abbeywood and Thamesmead (25%); Kingston (24%).

However, the percentage of male U3A members does not match the percentage of men in the 50+ or 65+ population in any borough.

The average total size of U3A for both London and Surrey Network is 563 members and there does not appear to be a correlation between size of U3A and percentage of men. The larger U3As in London (Barnet, Bromley, Orpington, SE London, Kingston, Merton, Richmond) tend to be in outer boroughs which tend to have a low level of deprivation, and high incidence of older people and well-qualified residents. Most of the U3As in Surrey Network are smaller despite the lower levels of deprivation and higher incidence of older people and well-qualified residents.

Appendix 2.2 contains some data about the activity groups that are popular with men. The following topics appear across several U3As: History (variations thereof), Science, Music appreciation (especially Jazz); Photography, Art appreciation, Philosophy, Languages, and Active pursuits (walking, day visits, gardening). Orpington has a men's golf group.

b) U3A at national level

An enquiry posted on the TAT website for help in identifying any existing research relevant to male membership of the U3A elicited just one email reply from head office saying that there was none known. However, trawling the Internet and an enquiry to the Association for Ageing and Learning were much more fruitful both in terms of helpful emails, conversations, and recommended reading. Dianne Norton, a founder member of U3A and a member of Merton U3A, very kindly made available a number of key historic documents from her personal library, and provided useful contacts and background information based on her long association with the U3A movement.

i. In 1994 Eric Midwinter, one of U3A's founder members, undertook a seminal study of 257 British U3As, with funding from the Calouste Gulbenkian Foundation. In his report, *Thriving people: the growth and prospects of the U3A in the UK* (Midwinter 1996), he noted that the membership of women outnumbered men by 3:1. He suggested that the two main reasons were the fact that there were more women in the Third Age population, and that they retired earlier than men. He also noted that many U3As reported that their membership was largely composed of married couples and single/divorced/widowed women. His research indicated that 62% of Third Age men were living with their partner and only 20% were living alone, whereas 47% of women were living alone. He suggested therefore that there were more women seeking social solace in organisations like U3A. (pp. 34/35) From his figures and anecdotal evidence, Midwinter suggested that the larger the U3A group, the greater was the proportion of male members (p.34). However, the responses we have had from U3As in connection with this current research paper do not support this (See Appendix 2.1).

Midwinter's comprehensive and still relevant report analysed the character of U3A membership by several factors including social class, education, age, gender, geography, retirement and leisure (Chapters 4 and 5). Whilst he did not

cross-refer all to gender, these factors are mentioned here because they are also used in other studies, and need further investigation by gender.

At the beginning of his report, Midwinter discussed the characteristics that define the Third Age i.e. "that arc in the life-span which follows the socialisation of the First Age, and the occupational and parental duties of the Second Age" He observed that people were terminating work and parenting earlier, but living longer, and that "a wide gap has opened in many people's experience between retirement and death, and this constitutes, in rough terms, the Third Age" (p.10). He noted however that "there are many, many people below that pensionable age who are already in the Third Age, as well as, it should be remembered, an interesting minority over the pensionable age who remain in the Second Age, most as paid workers, some as active parents" (pp. 31/32).

Exploring whether U3A membership thrives better where there is a predominance of older (i.e. pensionable) people, Midwinter found that whilst 45% of U3As were located in areas where the number of older residents was higher than average, the remainder were located in areas where the older population was deemed to be average or below average.

According to Midwinter, "If anything typifies the Third Age it is the 'leisure'…which the end of work and parental responsibilities endows". He noted that, allowing for domestic chores and sleep, retired people generally enjoyed about twice as much leisure time after retirement (men 92hrs/women 71hrs per week — women still more burdened by domestic duties), but he notes with dismay the many surveys indicating that, apart from watching TV, "older people have shown themselves disinclined to involve themselves in as much leisure activity as the working and parenting elements in the population". Midwinter laments this "Waste Syndrome" but does not elaborate on "the hurdles to participation". (pp 26/27)

The report acknowledged that U3A was frequently claimed to be a predominantly middle class organisation with little appeal for working class older people. Whilst he agreed that social class and income have a bearing, he acknowledged that "the most telling criterion concerns educational qualification" (p.29). He mentions the Carnegie Inquiry 1992 report which found that the post-50 cohort of the time had a relatively impoverished education, and that 81% of those over 65 had not studied since leaving school (compared with 63% of the population as a whole). Analysis by social class found that only 25% in lower class groups as opposed to 75% of people in higher social class groups had taken up some form of learning since their initial education. (p.30)

Geographically, Midwinter found that most U3As developed in "what might be regarded as conventionally middle class areas", although "nearly a third have gained footholds in slightly differing cultural circumstances… proof enough that U3A is capable of establishing itself in most social conditions". (p.31).

In an analysis of U3A locations by population density, Midwinter found that nearly half were located in districts of middling population (100-200,000 people) and that the big cities were poorly served by U3As compared with smaller more compact towns. "It was, in fact, the failure of city-based U3As — Manchester, Liverpool, Leicester… which led organisers to think in terms of a 'village' approach within the city limits, that is, to adopt a clearly defined suburb or division of the city for development". Optimum size of U3A is a subject for debate (pp. 37-38), balancing the accessibility and 'personal touch' of a smaller organisation with the cost-benefits and additional activities that a larger organisation can offer.

Midwinter recommended that the journey time to U3A activities should not exceed 30 minutes. (pp.32-3). Despite being potentially better served by public transport, journeys for older people in large urban areas were often said to be more challenging due to unease about crime (especially for women), cost, and physical disabilities. Citing the Carnegie Inquiry, he noted that "over half of older age journeys continue to be made by car" and that "men in their 70s travel further than women in their 50s". (p.33)

With regard to publicity, Midwinter comments that "Lack of funds has always prevented a major campaign to promote U3A, although there have been scores of occasional articles in the press, popular and professional, and features in the media". Mostly, U3A's reputation has spread by word of mouth and the tireless efforts of many individuals.(pp. 18/19)

ii. On the Third Age Trust website, under 'The U3A Story' (Third Age Trust 2012a), there is mention of a mapping exercise conducted in 2001 with a grant from the Department for Education and Skills. [according to TAT head office, unfortunately lost/ destroyed in a fire]. The research confirmed that "Women vastly outnumbered men. Almost three quarters of the members (74%) were women, and only just over a quarter (26%) were men".

Other potentially relevant characteristics are reported, but not by gender:
- Average age of U3A members was 70.6yrs (6% under 60; 15% 60-64; 24% 65-69; 25% 70-74; 17% 75-59; and 13% over 80).
- It was still a largely middle class membership. The occupational breakdown was 40% professional, 15% managerial, 15% administrative, 4% technical, 4% manual, and 5% occasional or no employment. Most (84%) had some form of occupational or private pension.
- Reasons for joining: 29% mainly for social contact; 14% to acquire knowledge; 12% to acquire new skills; 10% to keep the mind active; 10% to meet people with similar interests [total 46% to learn/keep mentally active].
- The U3A had a low public profile for its size – almost no one learned about it first from the national media. 73% had become aware by word of mouth, and 11% from libraries and local press.

iii. The pioneering work of Audrey Cloet, a founder of Bath U3A (one of the largest U3As in the UK), has been acknowledged by Eric Midwinter and many others. By telephone and email correspondence, Audrey described some of her early development initiatives for the U3A nationally. Bath U3A has been successful in attracting a good proportion of men through strategic activities such as recruitment talks at local organisations with a large number of men (e.g. PROBUS and the Ministry of Defence). The Committee was also proactive in seeding groups for men, by setting up short courses on topics of interest that might inspire them to continue running a group. Activities in gender-specific groups were complemented by cross-gender social events. She also recommended setting up inter-generational activities, such as debates with local schools. Through the Hobby House project, Audrey sought to fund space and equipment for members to pursue activities that might not be possible in the smaller living spaces occupied by many retired people. Unfortunately, the project floundered on contractual issues and Audrey cautions against full partnerships that might cause complications over funding or other legal issues, but working closely with other organisations can be mutually very beneficial.

c) U3A internationally

Surveys in other countries such as Australia, Spain and Malta have also uncovered a significant gender imbalance. In Australia, surveys of several U3As by Swindell and Williamson in the mid-1990s (Swindell 1991; Swindell 1993; Swindell and Thompson 1995; Williamson 2000) found that approximately 80%

of the membership was female. The Australian research is pertinent because of the cultural similarities and adoption in Australia of the British model of U3A as a self-development movement.

i. Williamson looked at gender differences in U3A participation through a review of the literature as well as an empirical research project in 1996 amongst members of the Liverpool U3A School for Seniors in Sydney, Australia (Williamson 2000).

But The research included questionnaires and interviews, and "aimed to find out members' opinions about U3A, reasons for joining, their learning experiences, preferred learning styles, learning outcomes, gender issues, and social stereotypes of aging and learning". He concluded that "men are less likely than women to be drawn to Third Age learning in proportion to their numbers in the Third Age population. Definitive reasons for this are elusive, but they appear to cluster around the issues of retirement, generation, outlook and interests, health, and gender role socialisation"(p.63). He recognised the bias inherent in only interviewing U3A members (i.e. the already-converted). The report shed little light on what could be done to attract more men into U3A. He noted that other retirement organisations and activities also tended to be highly feminised.

Williamson predicted that opportunities for change lay with the Post WWII baby boomers who had the benefit of better education and health, greater longevity and prosperity and an awareness of the need for an active retirement. U3A "as an organisation of the 1970's and 1980's" will need to adapt to the requirements of younger generations. "Whether the gender issues surrounding participation today will persist hinges on gender relations and roles, the shape of adult education provision in the future, what it has to offer, and how easily it can be accessed"(p.53).

ii. In 2006, Lydia Hebestreit conducted a very helpful evaluation of U3As in Victoria, Australia. One of her stated objectives was to investigate the differences between male and female perceptions of U3A, and the "barriers to participation with special reference to the male population". Her research included a comprehensive literature review on the U3A movement internationally, as well as empirical research (both qualitative and quantitative) involving 627 members of two U3As plus the presidents of the 68 U3As in the area. The sample was considered representative of Australian national averages (24% male/76% female). Mean ages: men 73 years/women 70 years.

The report is full of interesting statistical tables and analyses of gender differences according to the following factors:
- age distribution by quinary age groups
- marital status
- education level
- type of work before retirement
- participation in U3A courses
- enrolment in courses at further education colleges or universities
- preferred learning environment
- reasons for joining U3A
- reasons for not joining U3A earlier
- length of U3A membership
- perceived benefits of U3A membership
- areas where U3A could be improved
- service as a U3A tutor
- service on management committee, and roles

The following is a brief summary of the findings:

1) All the demographic variables showed marked differences between the genders (even after correction for the ratio of men to women in the sample) and echo many of the findings of UK research. 80% of the men were married (50% of women); 12% of men were widowed (33% of women). The general standard of education was quite high, with 64% having some form of education beyond high school (men 80%/women 60%).

2) Analysis of work before retirement indicated that 45% had been in professional occupations (similar for men and women), 25% secretarial/office work (mostly women) and 14% in management positions (men 30%/ women 9%).

3) There were differences in the reasons for joining, with the men indicating a desire to gain more knowledge, while the women were looking more for personal satisfaction and making new friends. The rate of participation and perceived benefits of participation were similar for both genders. Both rated benefits as high. Many and varied benefits were cited, although women responded slightly more positively than men.

4) Lack of awareness about U3A was the main reason given for not joining U3A earlier (men 35%/ women 31%). This was followed by "too old to learn" (men 11%/ women 14%). Negative previous educational experience was more inhibiting for men (14%) than women (7%), but the term "university" was more off-putting for women (9%) than men (5%) (p.146) Other reasons for not joining earlier included inconvenience of course timing/venue; "thought I was too young"; and still working full- or part-time, or caring responsibilities.

5) Only 8% of respondents had enrolled in other courses at universities or adult/further education establishments. The main reasons given were "not interested" (70% men/56% women), and cost (27%men/ 37% women).

6) Of the 15% respondents who said they had served as tutors, men (21%) significantly outnumbered women (13%), despite being under-represented in overall membership. This might be a reflection of higher educational achievement of men, as 79% of the tutors had post-high-school education (54% had university qualifications). (pp.147-149).

   Despite being significantly outnumbered on Management Committees (38% men/ 62% female), men punched above their weight in comparison with their overall U3A membership of 24%. Men were more likely than women to be President (55%) or, Vice President (63%). The role of Treasurer showed no gender bias, but women were more often Course Coordinators (76%), Publicity Officers (70%) and Secretaries (77%). These roles could reflect educational achievement and type of work before retirement. (pp. 168/9)

7) In response to a question about areas for U3A improvement, the main suggestion was "Types of course offered" (39%) and this was the main concern for men. Analysis of the courses offered indicated the usual predominance of subjects from the arts and humanities. A wish-list by respondents added science and financial management — these were predominantly requested by male respondents. However, 96% of U3As in the sample said that they did not provide courses aimed at gender specific participation.
   Venues and scheduling of classes were also areas suggested for improvement. 37% expressed a preference for small informal groups; 35% said venue did not matter; 28% preferred traditional classroom settings (men 31%/ women 27%). Only 0.5% preferred private homes although these were used in 40% of cases. (pp 119-121) Finding tutors and suitable venues were cited as the most significant problems for U3A presidents. (pp165/166)

iii. In 2012, Marvin Formosa published a global overview of U3A development from its beginnings, with an analysis of current issues and predicaments, and helpful suggestions for how the movement might be revitalised for the future. He noted that research into U3As has found a number of crucial biases, one of which is the excessive 'feminisation' of U3A, in terms not only of membership and management, but also the course content. Conversely, he also reported that despite the high participation rate of women, there is a degree of gender-stereotyping as there are generally more male tutors, and "male learners are more likely to dominate any discussion even when in the minority".

U3A membership is regarded as very middle class, even élitist. In addition to contributing toward the gender imbalance, Formosa notes that the primarily liberal-arts content is "perceived as alien by working-class elders… more interested in practical knowledge related to lifelong work practices" (p.12). By comparison, "older adults who have experienced post-secondary education, and have advanced qualifications and skills, are already convinced of the joy of learning" and in joining U3A they are "going back to an arena in which they feel confident". While he notes that "heavy class baggage" inherent in the organisation's title can be daunting to the less privileged, there have been many changes since U3A was established, and the "incoming cohort" is more diverse and better educated (p.12).

Other excluded groups mentioned by Formosa are ethnic minorities, and "fourth agers" (those with physical and cognitive difficulties who may be residing in care settings — for whom he recommends a number of special provisions). He reminds us that U3A founders hoped that U3A would play a key role in strengthening intergenerational ties, but that most continue to follow "age-segregated" programmes, which separate older people from the rest of society.

Formosa judges that the U3A movement in Britain is at a crossroads and needs to consider some fundamental changes in order to "remain more in tune with the needs and interests of contemporary older adults" (p.15). He makes a number of constructive suggestions along the following lines (there is more detail in the article):
1) Overcome the French-British polarities, so that U3As can work more creatively in partnership with other tertiary education providers (e.g. Open University) especially if this helps to access facilities not otherwise available.
2) Improve the quality of learning (so that it is less passive).
3) Strengthen the quality and relevance of instruction to accommodate the interests and skills of the younger cohort, and embrace the Web2.0 revolution using interactive tools such as Blogs, Wikis, Podcasts, online journals, etc.
4) U3A must be "part of the debate that identifies appropriate curricula for older people…
   - there is a real urgency for U3As to include non-liberal areas of learning" such as financial literacy, health and caregiving; scientific courses including environmental studies; even literacy, as later life illiteracy is well-known.
   - add courses to attract excluded groups such as men and ethnic minorities.
   - introduce inter-generational sessions that would link Third-Agers with children, teenagers, as well as younger and older adults. Activities could include book clubs, drama, film-screenings, community work (e.g. mentoring and adoptive grand-parenting).
   - environmental volunteering.

6. WHAT DO WE KNOW ABOUT OTHER ORGANISATIONS?

The following are some organisations mentioned because of their special experience in providing non-formal/informal learning for men in Britain, and some joint activities with them may be worth considering.

i. **The Workers' Educational Association (WEA)** claims to be the UK's biggest charity and "the largest voluntary-sector provider of adult education". It was founded in 1903 to support the educational needs initially of working men and was known as "The Organisation for the Education of Working Class Men". By 1905 it had embraced the education of working class women and changed its name to the Workers' Educational Association. The organisation's development has a number of similarities with U3A in that it began with a formal partnership with the Universities Extension movement but eventually broke away to enable a more independent approach through a network of small self-help groups. There were strong links with the Trades Unions, and the WEA played an active part in improving public education for both men and women during the 20th century.

The WEA website (WEA 2013) says that there are now around 1,000 WEA branches, and the organisation offers "over 9,500 part-time adult education courses" to around 78,500 learners of all ages "from all walks of life" across the UK. There is a great emphasis on access for disadvantaged groups, and a "student-centred approach in which teachers and students work as equals". Courses are "created and delivered in response to local need, often in partnership with local community groups and organisations", and include arts and humanities, sciences, and various personal and community development topics. The main funding organisation is now the Skills Funding Agency. Other funding comes from course fees and various public and not-for-profit organisations, including Age UK. Partners include a number of community and cultural organisations, including residential centres for older people.

The 2008 Ofsted report on WEA (published on the WEA website) (see WEA 2013) noted that 90% of the courses were non-accredited. Ironically, the report also noted that 74% of the learners were women, and the key areas requiring improvement included "insufficient participation of men"!

ii. **Open University(OU)**: According to the OU website, J.C. Stobart, the educationalist and historian, wrote a memo proposing a 'wireless university' in 1926 while working at the BBC. However, it wasn't until the 1960s that the concept was developed fully under Wilson's Labour government, and the OU took its first students in 1971, supported by late night TV broadcasts. "The Open University was the first institution to break the insidious link between exclusivity and excellence" and "like all revolutionary ideas, attracted hostility and criticism".

OU now claims to be the largest academic institution in the UK with currently over 240,000 students (22% overseas), around 7,000 tutors and 1,100 full-time academic staff. Over 70% of OU students work full or part-time, often paid for by employers, and the open admissions policy aims to encourage people who failed to achieve their potential in earlier life. The OU is opening up opportunities for lower-income groups and people with disabilities. Dedicated to distance learning, it has maintained a partnership with the BBC for over 40 years, and now publishes an extensive range of online learning materials, with 52 courses on subscription through the ITunes U app, and around 11,000 hours of free learning resources on the OpenLearn website. Thousands of research articles are publicly available through Open Research Online, and the OU collaborates with other organisations in many ways such as providing courses and collaborating on curriculum development.

The majority of students are under 50 (average age 31). Correspondence with the OU Information Office reveals that that, "amongst this year's students, 16% are aged 50yrs+, dwindling to 3% aged 65yrs+. There is a 60:40 female:male split over the entire 2012/13 student population, a 55:45 split in the 50+ age group but very interestingly the ratio reverses for the 65+ age group, 45:55". See Appendix 3.1.

Appendix 3.2 lists the top ten courses taken by all students, and then provides a breakdown by age and gender. The top subject for male students of all ages is mathematics, followed by Computer Science, Historical/Philosophical studies, Engineering, and Law. Women tend to go for arts and humanities (Historical/Philosophical studies, Psychology, Health and Welfare, Literature/Imaginative writing.

In 2007, the Third Age Trust signed a Memorandum of Understanding (MOU) with the OU. MOUs were also signed with other organisations as part of an external relations exercise and are basically an expression of mutual support in principle, but do not as yet extend to any discounts or special deals. However, with funding support from NIACE, U3A has considered the OU's OpenLearn units with a view to expanding U3A online course provision.

iii. **MensSheds:** This movement began in South Australia around 1995, as a way of engaging the large numbers of men (especially after the Vietnam War) who were unemployed, often living alone, and not participating in community programmes. The sheds are community places with tools and other resources to be shared. Each shed is locally run and can be used for a variety of individual or group projects, including some charitable or commercial activities. In addition to equipment, the sheds can provide practical training and learning about other subjects of interest to men. (Interestingly, despite being for men, some sheds have been facilitated by women). There are now over 800 sheds in Australia, and the number has been doubling annually. Menssheds are springing up in other Anglophone countries, such as New Zealand, Ireland and Britain. In Canada and the US they are called "mens dens". (Golding, 2007)

In the UK, there are about 500,000 older men living alone, and the first MensSheds were piloted by Age Concern in 2009. There are now about 30 Sheds in the UK, including the following in London: Bexley, Camden Town, Camden Highgate, Newham, Deptford, Eltham, Tower Hamlets and Walworth. Sheds vary, but usually have a single focus, such as railway preservation or model engineering societies, woodcraft, museum work, and even renovating tools for African projects. The menSheds UK website provides assistance on getting started, finding funding, finding a suitable venue, purchasing and installing equipment, and various other practicalities (MensSheds UK 2013; Age UK 2012; John Lewis Partnership date?).

7. FACTORS AFFECTING LEARNING/LEISURE ACTIVITIES OF OLDER MEN

Official statistics and gerontological research often fail to look at gender differences. Until recently, there has been more research into the lives of older women, while older men have been somewhat neglected. It is said that the "feminisation" of education is a result of historic efforts (e.g. Education Act 1944/Russell Report 1973) to bring about social reform through education, including the education of women. However, given the recent concern about "masculinity in crisis" as women succeed in more of the traditional male domains, and due to the fact that men are living longer, there is a growing interest in male education, including that of older men.

The research reveals a complexity of inter-related factors such as demography, psychology of masculinity and social networking, marital status, educational experience, employment/retirement, social class, learning, and leisure.

The following are a few key points that seem pertinent to male participation in U3A, although different research sometimes results in slightly different findings:

a) Psychosocial issues

i. As Eric Midwinter commented (1996 p.35) "traditionally, men are said to have been acclimatised more than women by British society to clubablility, through the camaraderie of the school, the work-place, the forces, team-sports and the like". It could be said that these networks have traditionally been male-orientated, and often exclusive to women.

ii. There is a whole body of research into the different ways that boys and girls learn because their brains develop in different ways. [NASSPE Vlll conference Oct 2012] This can influence lifelong skills, interests, attitudes and confidence, depending on educational experience. Many people in Britain and in other countries — especially older people — may have been educated in single-sex classes, and may sometimes feel uncomfortable in mixed groups, especially if outnumbered. A study by Margett and Marsiske (2002) indicates that there are differences in the cognitive behaviours of older men and women, which can affect self-confidence, and Formosa (2012) mentions the "invisibility" of women in discussion groups where men are present (p.13).

iii. Male social networking also clearly differs from that of women. Research indicates that men are more independent and self-sufficient, and more inclined to rely primarily on their spouse/partner for social support, rather than looking to other family members or friends. However, women look to their partners and also to family/friends. (McFall 2012)

iv. The Office for National Statistics undertakes a series of studies under the 'Measuring National Well-being Programme'. The study on 'Our Relationships (Randall 2012)' notes that satisfaction with friends varies by gender and age with fewer men (43.8%) reporting high satisfaction than women (50.8%). The study on 'Older People's Neighbourhoods (ONS 2013b)' reported that feelings of belonging to a neighbourhood increase with age; however, until they reach 80+ years men report consistently slightly lower feelings of belonging.

v. The 'Taking Part' Survey, conducted by the Department for Culture, Media and Sport, monitors participation in a number of social and leisure activities. There is some analysis by age and gender. The 2011/12 survey found little difference in the proportion of men (44.5%) and women (46.9%) who participated in the categories of organisation surveyed. The most popular were sports/exercise, and hobby groups/social clubs. Men dominated these two areas of activity, especially sports, but women dominated in all other areas of activity, including adult education and groups for older people.

vi. Kate Davidson, Sara Arber, Tom Daly and Kim Perren at the Centre for Research on Ageing and Gender (CRAG) have published a number of inter-related papers resulting from research into 'Older Men: their social worlds and healthy lifestyles'. This has included investigations of older men's social integration and organisation affiliations, and the influence of social class and marital status (Davidson et al 2003a; Davidson et al 2003b; Perren et al 2003; Chatzitheochari and Arber 2011). Some of these findings have been incorporated into the research by Age Concern in their reports on 'Working with Older Men' (2006 and 2007).

Interestingly, Kate Davidson noted that older men were easier to recruit for research if they were white, professional, articulate, married/widowed, and motivated by an interest in 'helping other people'. However, there was no 'snowball sampling' effect from the men themselves. "Golf club members were

asked if they knew any other men the researchers could talk to, and they all said no. However, a woman member suggested four — they all turned out to know each other but hadn't suggested each other"! During the interviews it was also found that the male interviewees were more likely to open up and talk about personal issues with the middle-aged female interviewer whereas with the "olderish" male interviewer, they talked about how well they had done in their jobs". (Jones2013)

The following are some of the findings from the CRAG research reports:

1) Married men often have sizeable social networks — mainly led by their wives. In widowhood, these networks contract and men rely more heavily on adult children for support, although widowers may seek involvement with sports and social clubs, especially if that pattern was set earlier in life. Generally, however, older men prefer to maintain a small close social network.

2) Divorced men and bachelors tend to have very low involvement in organisations. The majority of older men live with a spouse/partner, but statistics indicate that an increasing number of men over the age of 65 live alone (29% in 2001).

3) About 50% of older men report membership of an informal organisation. Older men have usually belonged to the same organisation(s) for many years. Most of these organisations fulfil the dual purpose of providing social interaction and a forum in which to be active (e.g. sports), and/or 'useful' such as carrying out voluntary work.

4) About 25% of older men belong to a community/civic group (most commonly a residents' association, political party or voluntary organisation); other groups include social clubs, religious groups, and sports clubs, but membership of sports and social clubs declines with age — by the age of 80, membership drops by 50% of what it is for men aged 65-69).

5) Involvement of older men in organisational activity is strongly linked to social class. Working-class older men are less likely than middle-class men to be involved in community/civic groups or sports clubs — which are goal-oriented — and more likely to belong to social clubs that are not goal-oriented.

6) "Traditional notions of masculinity emphasise the importance for men of independence, self-reliance, and strength. These attitudes and beliefs exert a strong influence on men's behaviour at all ages, but particularly influence older generations" Age Concern (2007) p.13. This may result in avoiding "non-masculine" behaviours, such as seeking assistance, admitting to problems or displaying emotion. Widowed, divorced and never-married men are therefore often isolated and hard to reach.

7) Older men are prepared to join groups if the activities and ambience resonate with their identities and appeal to their interests. Men who feel isolated often prefer social over educational activities. Pubs/clubs are often popular and enable men to connect with the world and avoid female-dominated venues.

8) Men's relationship with their work is central to their identity, and retirement can be difficult for some older men who have seen themselves as productive contributors, but have to adjust to becoming unproductive or even dependent in later life.

9) Organisations and services geared specifically to older people are largely rejected by older men. Such organisations are seen as passive and highly 'feminised'. "Clubs aimed specifically at older people need to be made more congenial for older men so that they do not feel they are yielding up their individuality or admitting some sort of defeat by attending" Davidson 2003b p.3.

b) Life expectancy, retirement and Third Age

i. The term 'Third Age' was coined by U3A founder member Peter Laslett in his book *A Fresh Map of Life: the Emergence of the Third Age* (1989). See Eric Midwinter's definition referred to in para 6.b).i of this report. The concept was also explored further by the Carnegie Trust, which foresaw the need for re-assessment as future generations face changing situations. (Carnegie United Kingdom Trust 1993 and 1996). When the State Pension was introduced in 1908, it was on a means-tested basis for those aged 70, and for most people death followed not long after. The Third Age was a new phenomenon resulting from lowering of the pensionable age, improved health and longevity and therefore a longer period of retirement for a larger number of people. However, the Third Age for post-WWII baby boomers needs some re-assessment as more people live longer but need/want to work longer. The later period of increasing disability/frailty and dependency is referred to in the literature as the Fourth Age (75yrs+), where women currently outnumber men, but this phase also needs re-assessment.

ii. The Office for National Statistics 'Pension Trends' report (2012 Chapter 3) indicates that life expectancy and quality of life has increased for both men and women in the UK.

The report quotes (p. 3-5) from ONS calculations in 2008 which found that men at age 65 could expect another 17.5 years of life (9.9 in good health), and women 20.2 years (11.5 in good health). This post-retirement 'disability-free' period could be regarded as mainstream "Third Age" (men 65-76 years; women 65-77 years). Beyond this, life may be increasingly challenged by limiting longstanding illness or disability (men 76-83+ years; women 77-85 years+). These estimates are based on average calculations for life expectancy, but there are obviously many variations.

The report also quotes (pp.3-8) ONS statistics in 2009 indicating that the English regions with the highest life expectancy at age 65 for men were the South East/ South West and London for men; and London/South West and South East for women – these regions added about an extra year to the national averages.
Socio-economic categories have been used by the ONS to track life expectancy from the early 1980s. Men and women at age 65 in 'higher managerial and professional occupations' can expect to live about 3 years longer than those in 'routine' occupations (18yrs/15yrs respectively).

iii. Recent changes in retirement age have complicated research into the Third Age, which is a lot more fluid than it used to be because of changes to State Pension Age (SPA). Women's retirement age is gradually being extended to catch up with that of men at 65 years, and for statistical purposes, the Office for National Statistics now refers to the period between 50-64 years of age as the "pre-retirement age" for both genders.

The ONS report on 'Older workers in the labour market' (ONS 2012a) states that whilst men are still working longer than women, it is increasingly common for both genders to work beyond SPA, the number reaching 1.4m nationally in 2011 (12% of the pensionable population, a rise from 7.6% in 1993).

The ONS 'Pension Trends' report (ONS 2012b Chapter 4) gives statistics on economic activity by age groups. From Age 50 to SPA, 62% of men are employed full time and 10% part-time, but after SPA full-time work drops to 5%, while 7.4% continue working part-time. Amongst women aged 50 to SPA, 40% are working full-time and 3% part-time; after SPA, 30% are working full-time and 8% part-time. See Appendix 4.4 for further detail.

There is a gender difference in the NS-SeC classification of work undertaken by those working beyond SPA. More men are employed in higher-skilled jobs (67%) than women (36%) and more women are employed in lower-skilled jobs (64%) than men (33%). See Appendix 4.1 This may be relevant to male membership of U3A as members seem to be drawn primarily from those with a higher level of education and skills.

There is a growing number of business start-ups by older people. Amongst all those working beyond SPA, 69% are classified as employed, and 31% self-employed (significantly higher than the 14% self-employed pre-SPA). According to the statistics from the Department for Work and Pensions (DWP 2012), the figures increase after age 65 for both genders: age 50-64 (Men 25%/Women 12%) and from age 65+ (Men 43%/Women 28%).

iv. The Skipton Building Society recently commissioned a survey of 2000 adults to investigate retirement choices (Skipton Building Society 2012, 2013a, 2013b). Respondents replied as follows to questions about reasons for continuing to work longer, albeit mostly part-time: To keep an active mind (58%); to prevent boredom (55%); afraid of slowing down (53%); need the money (50%); to keep fit and healthy (46%); reason to get up every day (46%); want to make a contribution to society (37%); like interacting with younger people (33%); don't want to be at home with the other half (33%); to save up an inheritance fund (31%). Other reasons given include saving for holidays; addiction to work; few hobbies with which to fill the time and keeping up-to-date with technology. Unfortunately the survey results are not presented by gender.

v. With regard to age and learning, the NIACE Older Learners' Survey 2012 (McNair 2012) suggests that motivation to learn changes with age and can be divided into two distinct phases after the age of 50. The first phase is still related to employment through relatively formal kinds of learning and through the workplace, as well as support for caring responsibilities. After retirement (albeit a more fluid phase), people can look to learning for pleasure and personal development.

In his paper on Lifelong Learning, McNair (2009 recommends a "Third Age curriculum" (pp.53-7) which would prepare people for self-sufficiency. "Where couples have lived their adult lives with strong differentiation of roles, bereavement may confront the surviving spouse with a sudden urgent need to acquire new skills, like cooking for men and financial management for women". Similarly, good IT skills can help those with reduced mobility. "A coherent retirement curriculum would include attention to all these issues: meaning and purpose, health and finance, communication, citizenship, and volunteering". McNair also recommends a "curriculum for the Fourth Age" (75+) (p. 56), taking into account greater physical and mental frailty but recognising the need for a new phase of continued learning. This resonates with many of the suggestions made by Formosa (2012).

c) Socio-economic issues/'Social Class'

As indicated in the above section, the definition of social class by government statisticians and many academics is based on the National Statistics Socio-economic Classification (NS-SeC) See Appendix 4.1. Researchers also use the NRS Social Grades scheme maintained by The Market Research Society, and these have been used in the research on learning (e.g. the NIACE report on Older People's Learning (NOLS) (McNair 2012). See Appendix 4.1.1.

In research about older people, social class generally refers to the occupations people have had prior to retirement. It could be said that this is a very narrow definition, and leaves out a number of other subtle and complex social/ cultural factors that people use to judge how comfortable they might feel pursuing various activities in different social contexts.

Retirement is said by some to be a social leveller, but the terms "genteel poverty" and 'nouveau riche' indicate both an economic and social level that people might find themselves in during their lives, including retirement, despite their origins. Many women have not had access to the higher occupational categories, and find themselves economically worse off than men in older age. Many successful people (especially entrepreneurs) have risen to the top despite little formal education. Migration also plays havoc with concepts of social class and learning, because many migrants may be well educated and keen to learn, but may not reach their full potential in the UK job market for various social reasons. "Intention to learn is strikingly higher among people from minority ethnic groups (27% compared to 18%)" (McNair 2012 p.31.)

'Social class' is considered a major factor in determining who learns, what they learn, and where. "Generally, people in higher social classes stay longer in initial education, and are more likely to continue learning throughout their adult life into retirement".(p.12) Only 11% of the NRS grades D/E are likely to return to learning compared with 33% of the A/Bs. (McNair 2012 p. 35). However, across all social classes, the report finds that men are less likely to return to learning than women, and the most resistant are men in the lower social classes (C1/C2 – NRS social grades).(McNair 2012 p.35).

Several surveys of U3A membership indicate that members are largely drawn from the professional categories. This report has also found an apparent coincidence between the higher U3A membership and residents from higher NS-SeC categories living in relatively prosperous areas of London and Surrey.

The 'U' in U3A has been the cause of much soul-searching and debate, largely because of social class issues. To some it is an attraction while to others it smacks of intellectual/social élitism that is daunting. Formosa (2012) referred to it as "heavy" baggage (p.12). Hebestreit (2006 p.145), found in Australia that it was more off-putting for women than men, perhaps reflecting gender and generational issues which may not be so relevant for future generations with better access to higher education.

d) Learning issues

The OECD report "Education at a glance" (OECD 2012) compared percentages of older people participating in adult education across OECD countries in 2007. In the 65-75yr age group, Britain came top with more than 20%. "In all six countries for which data was available, women participate more often in formal and/or non-formal education than men". The report also confirms that people with "tertiary education participate in formal and/or non-formal education more often than those with low levels of education". (No statistics were found on participation in informal learning)

While it's agreed that educational experience is probably the key factor affecting the take up of learning opportunities in retirement, there is confusion in the way 'learning' is defined by government, education providers, researchers, and the general public. There is generally no problem concerning formal learning, but different definitions or interpretations of non-formal/informal learning activity are of direct relevance to U3A.

There have been two main strands of research into adult education:

1) The Department for Business Innovation and Skills (BIS) National Adult Learning Survey (NALS) (Department for Business Innovation and Skills 2012). The latest was conducted in 2010 but not published until October 2012, and defines learning as follows:
   - Formal learning: learning that is intended to lead to a nationally recognised qualification even if the qualification is not achieved
   - Non-formal learning: a course or taught class that does not lead to a nationally recognised qualification
   - Informal learning: involves self-study to improve knowledge of a subject, not involving taught classes or qualifications. This might include reading books, manuals, journals or attending seminars.

2) The National Institute of Adult Continuing Education for England and Wales (NIACE) undertakes two regular surveys of adult learning:
   - The NIACE report on Adult Participation in Learning (NALS) (Aldridge and Hughes 2012) covers all people participating in some form of learning since leaving continuous full-time education (CFTE), and includes some data on older learners but not all findings are reported by age/gender.
   - The NIACE report on Older People's Learning (NOLS) (McNair 2012) is a more focused analysis of the NALS data subset on older people (50+).

NIACE questionnaires define learning as follows: "Learning can mean practising, studying, or reading about something. It can also mean being taught, instructed or coached. This is so you can develop skills, knowledge, abilities or understanding of something. Learning can also be called education or training. You can do it regularly (each day or month) or you can do it for a short period of time. It can be full time or part time, done at home, at work, or in another place like college. Learning does not have to lead to a qualification." McNair 2012 (p.11)

Since the government's 'Learning Revolution' white paper in 2009 (Department for Innovation, Universities and Skills 2009), definitions of non-formal/informal learning appear to have merged to the NIACE definition, and 'non-formal' has lost its specific identity and become absorbed into 'formal' education. Government policy has concentrated resources (through the Skills Funding Council) on full-time vocational qualifications and basic skills, primarily benefiting the young in lower social classes. This funding shift has resulted in a massive drop in part-time courses, favoured by older people. According to McNair (2009 p.35), "a considerable proportion of learning has been displaced from the public sector to private and voluntary providers, and to informal learning".

This change which has led to a decline in recognition and support of non-formal/informal learning is also of concern to Jim Soulsby, who has been involved in research and several publications on older adult education for many years, formerly as Older and Bolder Development Officer at NIACE, and currently as Development Coordinator for the Association for Education and Ageing. He is against the hierarchical approach that prioritises formal education and argues for recognition and support for all forms of learning throughout life.

Nevertheless, the NOLS 2012 survey (McNair 2012 p.17) reports that 20% of older people were engaged in some form of learning, which is unchanged since 2005, although the what/where/why has changed markedly (p.7).

The following is a summary of the NOLS findings with some relevance to U3A and gender differences:

1) There has been a dramatic fall in the numbers of older people learning through major public providers (universities 14% to 7%, and further education colleges 21% to 8%) but they continue to attract AB and C1 men. The proportions of older people learning through adult education centres and the WEA has risen from 7% to 12% (predominantly women, over 64, retired, social classes DE). (p.26)

2) People are working longer and "Employment status is more influential than age itself in determining how likely people are to be 'learners', the subjects chosen, the reasons for learning, and the benefits achieved" (p.7). Older learners are "more likely to be learning in work-related settings" and "employers pay for learning for about half of all older employees… though full-time employees are more likely to benefit than part-timers". (p.8). As men work longer than women, they are more likely than women to be benefitting. People from ethnic minorities are also more likely to be learning on the job. (p.28)

3) Under the heading of "who is learning", the NOLS 2012 report indicates that "there is very little difference between older men and women, although women are more likely to say they have done no learning since school, while the men say they have done some but more than three years ago" (p.14). The differences lie primarily in how older people are learning.

4) There has been a rapid rise in independent learning, [38% of all learners aged 50+], and "a substantial decline in learning as a social activity to learning as a solitary one". There has been "a marked growth in the numbers reporting learning online [13%], even amongst the 75+ age group". "Independent learners are older, more likely to be male, and better educated". (pp.8, 27, 42)

5) There was a huge demand for computer-related learning when the last survey was undertaken in 2005, and whilst this is still the top priority, the demand has dropped from 40% to 17% of all older learners and the trend is declining, which suggests that many feel they have now caught up. (pp.16,17) "It is possible that the rise of independent online learning is adding an entirely new form of learning and cohort of 'learners', which is masking an overall fall in traditional forms of learning." (p.7)

6) "Although overall use of online sources declines with age, it is more widely cited than radio or television among all age groups, including those over 75… It is notable that these modes of learning are relatively widespread in all social classes and educational levels, although the figure is higher in the higher social classes. They are more likely to be used by those in work than those who are retired… Older people from minority ethnic groups are more likely to use these tools for learning than White British people" (pp.29/30).

7) "There remains a substantial 'digital divide' in society, but a quarter of non-learners said they would like to find out more about online learning. The response was very evenly divided across gender, age, social class and employment status, but was notably higher in London than the rest of the country… Similarly, a quarter of respondents said they would need support to

take up online learning, mainly with how to learn or find information" — this included part-time workers, the oldest, and lower social classes" (p.30)

8) "Those learning 'independently and with others' now form 10% of older learners." The NOLS report (McNair 2012) acknowledges the rapid rise in U3A membership in recent years, but only 1% of the survey respondents reported that they were learning through U3A. As the report suggests, this may reflect the fact that U3A members do not regard their experience with U3A as 'learning'. There are questions about the design of the survey questionnaire (Third Age Trust 2013B pp.24-26) and there is evidently a need for further clarification. (McNair 2012 pp.27, 42)

9) The NOLS report (McNair 2012) acknowledges that older people may have a more formal concept of what 'learning' is, and responses to the survey probably underestimate the learning actually taking place".(p.11). This report and others also indicate that male participation in education and training is strongly associated with work, where qualifications are important, so men are also more likely to have a more formal concept of what 'learning' is. The same applies to minority ethnic groups.

10) Those learning for non-work-related reasons are most likely to be studying out of interest in a particular subject — primarily the liberal arts, languages and humanities (hence reflecting the feminisation referred to by Marvin Formosa), but higher social classes and White British are more inclined to study for pleasure than lower social classes and minority ethnic groups who are more likely to study for work-related reasons.

11) Because the world of adult education has become so complex, many people — especially those aged 75+ and people in lower social classes — said they wouldn't know where to go for information and advice about learning opportunities. The Internet was the first port of call for most others, especially those aged 50-54yrs, people in higher social classes (30%) with higher education (36%), people in employment (full-time 33%/part-time 26%), and men (21% compared with 15% of women). The choice of public libraries as a source of information was nominated particularly by women (17%), people over 65yrs and the retired (17%), and those without Internet (18%). Libraries were least likely to be selected by those with higher education. Further education institutions were selected by 14% of all people, but employers only 2%. 'Friends and family' were selected by 6%, mainly by women, older people, and lower social classes. (p.33).

Studies of gender differences in online courses indicate that women are as competent as men, and often outperform men especially in online forums. "Women attach greater value to the pastoral aspect of tutoring and have different interaction styles from men, which may have implications for online tutoring support" (Price 2006). Another study found that "it is loner males that are disadvantaged by distance learning… Women and older students… seem to be more motivated, better at communicating online and at scheduling their learning. In contrast, male students and younger participants need the discipline that classroom sessions provide." McSporran and Young, 2001

Jim Soulsby is now turning his attention to the marginalisation of men in adult education, and has written a chapter for a new publication to be entitled *Men Learning through Life.* (Golding et al Forthcoming). To be published by NIACE). His article provides a historical background and acknowledges today's feminisation of adult education, reiterating many observations from existing literature. However, he also makes the point that the evidence we have is not sufficiently

differentiated to enable us to understand all the relevant factors and indicate what we need to do to rectify the gender imbalance.

It is generally accepted that men prefer to learn formally, and are under-represented in informal learning. Soulsby agrees that "Behind this reasonably accurate statement is the suggestion that those men are the ones already well educated, articulate and either currently in employment or using their engagement in learning to enhance their employability". He also adds that "Men are more likely to seek quickly visible outcomes and tend to be frustrated if these are not apparent."

However, Soulsby urges that government education policy and adult learning providers need to understand more about masculinity in the context of issues such as the "timing, content, location, type of activity, size of group, and teaching methodologies…" With regard to older men, he adds that we need to know more about how social class, educational and employment background and retirement impact on social status and motivation to engage in learning. In his email correspondence he challenges U3A to help to move the agenda forward.

e) Leisure issues

i. Men and women often have different perceptions of what leisure is, and pursuits tend to follow gender socialisation (i.e. what people consider acceptably masculine or feminine) and social evaluation (i.e. how people like to be valued by 'significant others'). However, there are many variables depending on factors such as age, social class, and abilities. (Source: De Fontanelle and Zinkhan 1993).

ii. The UK Department for Culture Media and Sport conducts a regular survey of lifestyles and participation in a range of leisure and social activities. The survey includes analyses of participation by age and gender, but the resulting report doesn't necessarily include all the data. The following are some findings of the Taking Part Survey 2011/12 (Department for Culture Media and Sport 2012):

- Leisure activities reported by more than 50% of men include: watching TV, visiting family/friends, listening to music, Internet, eating out, visits to places/days out, sports/exercise, reading (mainly newspapers), pubs/clubs, DIY, cinema and gardening.

- Use of Internet/digital media is more common amongst men than women. Men also participate in sports/exercise more than women, with walking/hill-walking/rambling being the most popular amongst older men. Also popular are cue sports, cycling and swimming. Other activities in which men participate more than women include pubs/clubs, DIY, playing musical instruments, and attending sports matches.

- Activities that women participate in more than men include visiting family/friends, eating out, visits to places/days out, reading (as indicated in the NOLS 2012 report (McNair 2012), women visit libraries more than men), arts/crafts, attending theatres/concerts.

- Leisure learning is reported as low for all adults, but there is a small peak in the 65-74 year age bracket, and people in work study more than people out of work.

- There are differences in outlook, interests and capabilities between men at different ages. The 65-74 year age group seem to report above average participation in a number of leisure activities, but participation in most

activities tends to decline at around 75 years, and men over 80 tend to withdraw from social contact.

iii. The UK Office for National Statistics has for several years conducted Social Trends surveys (Hughes 2010; Beaumont 2011). As above, there are statistics by age and gender, but these are not always published. The following are some findings from ST41 (Beaumont 2011)

- In 2009, people aged 55-64 made 17% (6.6 million) of all holiday visits abroad and people aged 65+ made 11% (4.1million). Although there was a general decline between 2005-2009 in the number of people travelling abroad on holiday for economic reasons, there was little change for the 65+ age bracket. (p.14). This suggests that travel is a significant activity for older people, although further analysis is required by gender, education and social class.

- Nearly 50% of men participate in some form of volunteering, particularly in the fields of sports/exercise, hobbies, recreation, arts, youth work, citizen groups and politics. Male volunteers are also more likely than women to sit on committees, provide transport, or give advice and counselling. They are less likely than women to volunteer in health/social welfare, children's education or with elderly people.

iv. Skipton Building Society recently commissioned the following research into life in the UK after retirement (age not defined).

- A survey of 623 older adults (Skipton Building Society 2013a) found that "8 in 10 people are treating their retirement as 'the beginning rather than the end'… four in 10 senior citizens are choosing to use their later years to 're-live their youth' by taking up hobbies and interests they previously enjoyed before taking on family and work commitments…A quarter of elderly people volunteer or do charity work on a regular basis, while others embark on interests such as shopping, cooking, photography, gardening and reading… 29 per cent have aspirations to travel the world, 11 per cent dream of learning a language". Other aspirations include "Writing a book, getting back out on the dating scene, decorating the home and garden and taking up a new exercise…"(p.21)

- A survey of 678 people reports, found that women are more likely to miss work than men, more likely to feel lonely and more likely to worry about finance in retirement. (Skipton Building Society 2013b).
  "For women, a happy retirement relies on a good social life – indeed, 56 per cent try to regularly meet up with friends compared to just 33 per cent of men… When it comes to missing aspects of work, 62 per cent of retired ladies admit they miss the banter they shared daily with colleagues, in contrast to 44 per cent of men. Eight in 10 women often feel that they have no purpose left in life now that they aren't in employment, compared to just 54 per cent of men…" However "48 per cent of men love every minute of their retirement, compared to 38 per cent of women. When it comes to hobbies, men tend to spend their time walking and hiking, visiting historical landmarks and finding things around the house to fix. Men are also more likely to book holidays than women". By comparison, "women cook, tend the garden, read or join clubs…"

8. CONCLUSIONS

a) What are the factors affecting learning/leisure activities of older men?

Despite the relative paucity of data, the literature review has revealed a number of inter-related factors that are considered to affect the take up of learning and leisure activities by men in later life. These include age, psychology of masculinity, male social networking, marital status, educational experience, employment/retirement, and 'social class'.

Several of the terms — Third Age, Social class, Learning, and Leisure — are difficult to define, and this has complicated the research as survey results may differ or be open to different interpretation. Nevertheless, the following are some key findings from the literature review that seem pertinent to men and U3A:

- Men are socially more self-sufficient and less inter-dependent than women, so they are less likely to join organisations primarily for social reasons. On retirement, it seems that women miss the social interaction of working life more than men (Skipton 2013b) and seek to develop new social contacts. Married men generally have larger social networks, mainly led by their wives; however, widowers prefer smaller social networks of family and close friends. Divorced men and bachelors are the most difficult to recruit.

- Men will join organisations and activities that resonate with their identities and interests. Work is central to men's identities and often influences their choices in retirement; they often retain old connections and organisational memberships, and identify less than women with their local neighbourhood until older age (Lofts 2013). Their leisure pursuits are more likely to follow what people consider to be acceptably masculine although this may vary with age, social class and abilities.

- Organisations and services geared specifically to older people are largely rejected by older men because they are regarded as passive and feminised. Men prefer intergenerational activities and to mix with the real world.

- Middle-class men and those with higher levels of education are more likely to take up leisure learning and other goal-oriented activities on retirement, whereas men from lower social classes or with lower qualifications prefer social activity that is not goal-oriented. Involvement of men in organisational activity is strongly linked to 'Social class'.

- A shift in government policy and funding since 2009 has emphasised skills training (primarily benefiting younger people) and less support for lifelong learning. There has been a dramatic fall in numbers of older people learning through public providers, although universities and further education colleges attract some middle class men. Women are more concerned about finances than men.

- Increasing numbers of people are working beyond State Pensionable Age (SPA). Amongst those men working beyond SPA (65yrs for men), more are likely to be working in higher-skilled jobs. Those working beyond SPA are likely to be learning through work, and those in work are more likely to be learning than those who have retired.

- There has been a rapid rise in independent learning and a marked growth in numbers learning online, even amongst those aged 75yrs+. Independent learners are more likely to be better educated men, learning on-line or through TV/radio. Men prefer to learn formally, and are under-represented in informal

learning. They prefer more focused learning with clear outcomes (e.g. talks, visits, events, short courses, online courses).

- Older people from ethnic minority groups are also reported to be learning more formally in work-related settings, and online.

- 'Feminisation' has crept into the adult education sector in general, including organisations established originally for men e.g. Workers Education Association. Open University students are predominantly female (average 60% women: 40% men) but after the age of 65 the ratio is 55%men to 45% women. Even MensSheds are sometimes facilitated by women.

b) What do we know about U3As nationally and internationally?

There appears to have been very little substantial research published about U3A membership in Britain, apart from the works by Eric Midwinter in 1996 and the 2001 survey (summary of results currently published on the TAT website).

U3A surveys in countries such as Spain and Malta have apparently uncovered a gender imbalance, but this paper has focused on a review of English-language sources, and hence primarily U3As that have adopted the British model. Australian research is useful because Australia has adopted the British model of U3A and there are many cultural similarities (despite less social class division than in the UK). The survey by Lydia Hebestreit in 2006 specifically sought to investigate the differences between male and female perceptions of U3A, and the "barriers to participation with special reference to the male population". The results of the British and Australian research are remarkably similar, and the following is an amalgamation of key findings. (Detailed statistics are given in the main body of this report)

i. Membership profile:
- U3As everywhere are highly 'feminised'. Ratio of men:women is about 1:3. This ratio has persisted since the U3A movement was established.
- Average age of members is thought to be around 70yrs+.
- Mostly married couples and widowed/divorced/single women. (More married men than married women)
- Most have some form of education beyond school (more men than women)
- Largely middle class: about 45% professional (roughly equal for men and women), 25% administrative (more women than men), 15% managerial (more men than women), the balance technical, manual or occasional/no employment.
- Reasons for joining: Men mainly to gain more knowledge; women mainly for personal satisfaction and making new friends.
- The majority hear about U3A by word of mouth. Other sources include libraries (more women than men) or local press. Hardly anyone hears about U3A through national media. The surveys do not mention Internet.
- Main reason for not joining earlier: lack of awareness (more men than women)
- More men than women serving as tutors
- Men are also more often represented on Management Committees

ii. Institutional profile:
- Nearly 50% of U3As are located in areas with higher than average number of older people (Midwinter).
- Nearly 50% of U3As located in districts of middling population (100-200,000 people). Big cities are poorly served by U3As compared with smaller more compact towns (Midwinter).
- The majority of U3As develop in middle class areas.

- U3A is regarded by some to be both intellectually and socially élitist. Research indicates that the "university" concept may be daunting for those from lower social classes or with lower levels of education (but less inhibiting for men than women according to Hebestreit).
- Those learning 'independently and with others' now form 10% of older learners in UK. However The NIACE survey of Older People's Learning (2012) reported that despite the rapid increase in U3A membership in Britain, only 1% of survey respondents reported that they were learning through U3A, which suggests that U3A members do not regard their experience of U3A as learning, but this needs further clarification.
- The predominance of courses from liberal arts and humanities favours women and is less attractive to men, especially from lower social class or lower levels of education.
- Main area for improvement suggested by men: types of course offered. Most U3As do not provide gender-specific courses or have a strategy for tackling the gender imbalance. Finding tutors is one of the biggest challenges for committees.
- Venues and schedules: Private homes are used in most cases but are not the most popular choice of venue. Men prefer traditional classroom/gender-neutral settings (Hebestreit). Weekday timings do not suit all.

iii. U3A in the Future:

The literature contains several predictions that the U3A movement, "as an organisation of the 1970's and 1980's" (Williamson 2000) would have to adapt to the needs and preferences of future generations. In particular it was anticipated that changes would be required to accommodate the large number of post-WWII 'baby-boomers' who had the benefits of better health, education, prosperity and the expectation of a long active retirement. However, most of the published research pre-dates or overlooks several significant developments in the last ten years which have had huge and inescapable impacts on everyone, including older people. These include:

- The rapid development of information and communication technology which has had a revolutionary impact on learning, social interaction and virtually every other aspect of life.
- The severe economic crisis and resultant cuts to public services and insecurities for young and old in the UK.
- The increase in State Pensionable Age (SPA) in the UK, outlawing of age discrimination, and the trend for many people to work even beyond SPA, albeit often part-time.
- The impact of immigration into the UK and the resultant cultural diversity of major conurbations.
- Increased life expectancies of men and closing of the gender gap even beyond 90yrs+.

Marvin Formosa's *Four decades of Universities of the Third Age* (2012) provides a global overview of the U3A movement and a helpful analysis of current issues. "The key challenge faced by U3As is to remain in tune and relevant to the life-world of present and incoming older cohorts…" but U3As "remain locked in more traditional perceptions of late adulthood" (p.15). He makes suggestions on how the movement might be revitalised for the future, including:

1. To overcome the French-British polarities and working in partnership with other tertiary education providers (e.g. Open University).
2. To strengthen the quality and relevance of instruction, incorporating new technology, to accommodate the interests and skills of younger members.
3. To engage in the debate that identifies appropriate curricula relevant to the real learning needs of older people. (A 'Third Age Curriculum' was also proposed by Stephen McNair (2009)).

4. To add courses that appeal to excluded groups such as men, ethnic minorities and Fourth-Agers.
5. To introduce inter-generational ties, as proposed by U3A founders (most U3As encourage 'age-segregation' which is not good for members, especially men, or society in general).

c) What do we know about Merton and neighbouring U3As?

As has already been mentioned, this survey began with trying to understand more about the under-representation of men in the membership of Merton U3A, and this quest has led to a wider search for comparative information from U3As in the Surrey Network and London Region. It appears however that very little data is collected by U3As in general and the picture is far from complete. The following is a summary of information gathered so far:

i. Male Membership:

Total membership of Merton U3A is now over 800 but male membership is only 20%. Latest Census data indicates that the proportion of men aged 50+ and 65+ in the Merton population is 46%. Therefore, Merton U3A is not attracting a representative share of older men in Merton.

The percentage of men in the 50+ or 65+ age brackets in boroughs across London and Surrey is remarkably consistent at around 46%. The responses received so far from other U3As reveal quite a wide range, but the percentage of male members does not match the proportion of older men in the population in any borough.

The percentages of men in London Region U3As (22% average) are consistently lower than the percentages in Surrey Network U3As (31% average).

It seems that further one goes away from the centre of London, the higher the percentage of male members. The following are in the lead so far on male membership: Barnet (38%); Horsley (37%); Caterham (36%); Leatherhead (35%); Ashstead, Bookham, and Fetcham (34%); Sidcup (30%); Havering (28%); Orpington (27%); Bromley (26%); Richmond, Sutton, Abbeywood and Thamesmead (25%); Kingston (24%).

The average total size of U3A for both London and Surrey Network is 563 members, and there does not appear to be a correlation between size of U3A and percentage of men. Most U3As in the Surrey Network are relatively small. The larger U3As in London (Barnet, Bromley, Orpington, SE London, Kingston, Merton, Richmond) tend to be in outer London boroughs.

ii. Participation:

Men currently constitute about 20% of the Merton U3A Committee, but they are punching above their weight when it comes to group leadership (29%).

Our data on group membership, based on application renewals, is currently not comprehensive or reliable. We do not analyse the people attending talks, visits, social events. We do not currently collect data about reasons for joining/leaving.

Information has been requested from other U3As about the activity groups that are popular with men. Responses so far indicate that the following topics appear across several U3As: History (variations thereof), Science, Music appreciation (especially Jazz); Photography, Art appreciation, Philosophy, Languages, and Active pursuits (especially walking, day visits, gardening). Orpington have a men's golf group.

iii. Demographic characteristics of residents in London and Surrey

In an effort find some clues as to why U3As in the Surrey Network have higher percentages of men than those in London boroughs, further information was sought about some of the key demographic characteristics that might have an effect on the take up of learning in later life e.g. ages of members, marital status, qualifications, occupations/social class, retirement, deprivation, migration/diversity.

At Merton U3A we currently do not collect any personal data about our members apart from address, so it is difficult to analyse our membership (especially men) by any of these parameters. The same seems to apply to the other U3As we have contacted.

For the timebeing therefore, we are reliant on broad assumptions based on various demographic and other official statistics about the communities in which the U3As are based. It hasn't always been possible to find analyses by gender and age, and further research is required, but the following are some key indicators for boroughs/districts in the London Region and Surrey Network (see main text and Appendices for full analysis).

iv. 'The London effect'

On average, the residents of Surrey tend to be older than the residents of London. There are also significantly more retired men (and women) in Surrey than in London, and there's a migratory drift of older people from London to the Southeast/East of England. Residents of Surrey are much more likely to be White British and born in the UK. A much higher proportion of Surrey residents is married (consequently there are also more people who are divorced/widowed) but significantly fewer are single. There are more residents in London with Level 4+ qualifications but that is most likely because they are younger and therefore have better access to higher education than older people have had – further data required on older people. Most people in London and Surrey are classified as middle class professionals, (the category from which most U3A members are drawn). However, there are fewer women in Surrey classified as professional, and there are slightly more men in Surrey who are classified as Higher management and senior professional (who are less inclined to join U3A).

In other words, the profile of Surrey residents closely resembles the profile of typical U3A members – older, retired, married (or divorced/widowed), relatively well educated, middle- to higher-middle class, White British, born in the UK, The society is relatively homogeneous and prosperous, and older people (including older men) identify more closely with their local communities — as Eric Midwinter observed, U3As fare better in small compact towns than big conurbations.

London residents tend to be more diverse in many ways. Residents of Inner London boroughs tend to be younger, more highly qualified, and least likely to be married or retired. The Outer London boroughs resemble Surrey to some degree, with several boroughs that have an older, more prosperous, predominantly White British population, significantly more married people, and higher levels of retirement than the London average.

Merton's profile is closer to the London profile than Surrey, but it has quite a split personality. The postal addresses of Merton U3A members indicate that the majority live in the western parts of the Borough of Merton, and that Merton U3A struggles to attract members from the eastern wards. The pattern of U3A membership broadly coincides with borough statistics on the location of older residents who are largely White British and born in the UK. Residents in the western parts of the borough also tend to enjoy higher levels of education,

employment in management and professional occupations, and low levels of deprivation. Further data is required by age and gender at ward level in order to get a more accurate picture on retirement, marital status, qualifications.

d) Probable reasons for under-representation of men in Merton U3A

- U3A is unknown to many men because publicity — nationally, regional and local — is very low-key and does not employ the messages or channels likely to reach or attract them. The reliance on 'word of mouth' is more likely to attract people who are similar to existing members, who are predominantly women. U3A is therefore "off radar" for most men.
- For those who have heard of U3A it is often perceived to be an organisation for geriatrics and is rejected by many people, especially men.
- More men in Merton are working beyond State Pensionable Age (SPA), and amongst those, more are likely to be working in higher-skilled jobs — these are men who would otherwise be possible candidates for U3A membership. The timing of activities during workdays may not suit the increasing number of older people who are working.
- If older men are not learning at work, they are more likely to be learning independently, probably on-line or through TV/radio, and do not feel the need to join groups (they are more self-sufficient).
- Activities currently offered by U3A have a feminine bias with an emphasis on liberal arts, and there is not enough to interest men.
- Men prefer more focused learning with clear outcomes (e.g. talks, visits, events, short courses). The informal, slow-stream, self-development style of many U3A activities is less likely to appeal to men.
- Many men prefer classroom-type settings or other gender-neutral venues for learning and may not feel so comfortable meeting in people's homes.
- U3A is primarily a middle class organisation with members from lower management and professional occupations, who have benefitted from a good education. Men who fit the typical U3A profile live primarily in western parts of the borough. Men from more deprived parts of the borough are less likely to join an organisation that they perceive to be élitist and goal-oriented.
- Merton U3A membership is currently highly 'feminised'. If they don't know it beforehand, men may be unpleasantly surprised upon joining to find themselves so outnumbered, and may refrain from participation except perhaps for talks and visits which involve minimal commitment. They are unlikely to recommend it to their friends.

e) What might encourage more men to join Merton U3A?

- More effective publicity — local, regional and national — using messages and media that target and appeal to men. Promote more lively 'can-do' image
- Activities that interest men; maybe some men-only activities
- More time-limited and focused learning options with visible outcomes e.g. talks/short courses/events/visits/online courses. Our offer must have "added value" that is not so easy to achieve or so enjoyable to do by oneself.
- Better use of digital technology and online courses to support quality learning and more learning opportunities
- More inter-generational and community activity
- More gender-neutral venues/ambience that men find congenial
- Scheduling of activities to accommodate working people (e.g. lunch-times, weekday evenings or weekends)
- Collaboration with other organisations to improve facilities, resources, and community outreach
- Involve more men in Committee roles and volunteering
- Increased male membership will hopefully have a snowballing effect
- Because of the significant social differences between the west and east of the borough, different strategies may be necessary, involving different publicity, activities, venues, and collaboration with different organisations.

9. FURTHER INFORMATION REQUIRED

a) Data required /information management:

As indicated in the main text and conclusions of this research, we know relatively little about the membership of Merton U3A, how they fit into the local demographic scenario and the external market. In this report, it's been necessary to rely on statistical analyses and literature to draw assumptions about our membership, but it would be preferable to validate these assumptions through better data collection within the organisation.

Information is required about the membership, not only to check how it reflects market share (and hence the effectiveness of publicity activities), but also to help in planning activities and resources according to the varied requirements of members. For example, since interests and participation are known to change with age, it would be useful to know the membership age profile. Since so many people are said to be working beyond SPA, it would be useful to know how this impacts on U3A participation, and would help to schedule events at appropriate times. Information on educational, occupational background, interests and participation would also help to plan activities and resources for maximum benefit. Understanding reasons for joining or leaving also helps to monitor whether there are special issues that need attention.

It is therefore recommended that we collect the following data about our members:

- **Demographic:** age, marital status, qualifications; employment (past/present), interests; participation in non-U3A organisations or learning activities;

- **Participation:** how did they hear about U3A; reasons for joining/leaving; participation in groups, talks, visits, social activities; participation in committee/ tutoring or other U3A support roles; volunteering

The methodology for doing this needs to be considered carefully. We could collect some data by amending Application/Renewal forms. Data about participation could be collected through Group Leaders and organisers of Talks, Visits, Study Days/Shared Learning projects, social events etc. Alternatively we may opt to conduct a properly-constructed survey (as a good example, see the methodology used by Lydia Heberstreit)

Keeping a central collection of research and other management information (preferably on-line so that it is more accessible) would provide continuity over the years to help new Committee members come up to speed more quickly, help to monitor trends in changing times, and strengthen understanding about what works/what doesn't work. This is even more important for larger U3As.

b) External research

Assumptions have been made in this report, based on statistical analyses and a broad literature review, but we would need to undertake local market research to truly understand why older men in Merton are rejecting U3A.

It would be useful to work in conjunction with other U3As to design, implement and evaluate strategies in terms of what works/what doesn't e.g.
Publicity material and advertising channels; Gender – based activities of interest to men; Online learning; Venues/schedules

Research might be conducted by U3A members as a Shared Learning Project (most research about U3A has so far been conducted by university faculty and younger academics). NB Coordination with Gwen Wright and Janet Whitehouse at regional and national level.

National research about U3A needs updating to reflect a number of changes in factors such as social attitudes, health and life expectancy, education, work/retirement, leisure, prosperity, and technology (the digital age which has developed so fast in the last 20 years) — all of these have a gender aspect.

As suggested by McNair (NOLS 2012), U3A needs to work with NIACE and others in adult education sector to clarify definitions of learning (including digital).
"The notion of 'learning' is problematic… it is clear that many people interpret the term more narrowly than intended and probably differently by social class. The arrival of online learning as a major new feature of the landscape appears to be changing how people think about learning, as well as how they do it. The nature of independent, self-organised, and online learning is not well understood. Its growth might indicate a decline in the social benefits of learning, which are reported by significant numbers of older people, and especially the oldest. Its relationship to the growth of the University of the Third Age also requires further study." (p.9)

Note: In a telephone conversation with NIACE, we were informed that the 2013 questionnaire for NOLS is very similar to previous years in order to monitor trends, but it will contain some supplementary questions relating to community learning and impacts. Follow up with Fiona Aldridge.

It would be interesting to research French/hybrid models of U3A that have a close association with universities etc., to see how male membership compares with the British model — since it would appear that men are more inclined to hold a formal definition of learning.

10. SUGGESTED INTERIM ACTIONS

a) **Groups/Activities:** Gender-blind/Gender-differentiated can both work, but it's important to have a strategy and programme that can be evaluated, and monitor what works/what doesn't.

Most U3As adopt a gender-blind approach, but this evidently isn't working because the predominance of female members is having the effect of 'feminising' the curriculum, and there is a need for the Committee to be more pro-active at seeding groups/activities that appeal to men (recommended by Heberstreit, Audrey Cloet and others).

Invite men to an event to discuss what sort of activities and facilities they would like, and make sure they are involved from the start of any special initiatives. Make the most of their skills and knowledge. Help may be required in facilitating discussion and seeding ideas, or negotiating special deals for facilities or activities. (women may be more effective at facilitation and networking to get things going — they even do this in the MensSheds movement). Suggestions for discussion:

- Talks/Short courses (tasters) that may be a way of starting an interest group e.g. Science/technology; Financial management; Health and fitness/First aid; Legal issues; DIY; Cooking (see 'Third Age Curriculum' proposals by Formosa 2012 and McNair 2009)

- Making use of U3A, OU OpenLearn and other online learning resources could enable the provision of quality courses to complement in-house expertise

- Group discounts to e.g. sporting events; industrial/ transport/ military heritage sites etc.

- U3A events using local parks, sporting facilities, pubs/clubs e.g. sports days/tournaments (golf, tennis, cricket, boating); quiz night; heritage treasure hunt; picnic; themed social events led by activity groups e.g. art exhibition; French/Italian social; wine tasting;

- Consider building some U3A teams to participate in local public events e.g. Pub quiz team; U3A boat in the Great River Race; charity walks/runs, cycle races. This could also help to raise the U3A profile

- Men have different interests and abilities according to age, fitness, education, 'social class', marital status – and they don't necessarily mix well. Consider different types of activity/venues to cater for these differences.

b) **Male-friendly venues/social ambience:** Venues and events need to be more congenial for men. Having the option of alcoholic beverages in addition to tea/coffee/soft drinks at social events has been suggested.

Hebestreit's research found that meeting in private homes can be inhibiting for men, who often prefer more neutral venues. These could be in a traditional classroom/lecture hall or more informal setting. Apart from community centres and 'Church' halls, potential venues might include quiet spaces in restaurants/cafés, libraries/bookshops, museums/galleries, theatres/cinemas, visitor centres at heritage sites and parks/nature reserves, or sports centres. These venues will often charge for use of their facilities, but affordable group discounts may be negotiable.

The team at University of Surrey CRAG also noted that pubs/clubs are often popular, enabling men to connect with the world in a congenial atmosphere and avoid female-dominated venues. Tony Kane, Editor of Time and Leisure magazine, recently wrote about the current demise of pubs in general, but the opportunities they offer as a meeting place for many local clubs and interest groups. He cites the 'Hand in Hand' in Wimbledon which hosts 14 different groups including "poker, ping pong, beer tasting, squash, bell ringing choral singing, cycling, writing, quizzes and… Morris dancing".

c) **Scheduling:**
Many older men (and increasingly, women) work full or part-time, and Sundays can be a particularly lonely day for those who live alone. Consider scheduling some activities at lunch-times, weekday evenings or weekends.

d) **Intergenerational/community activities:**
- Provide opportunities for activities with local schools/colleges or youth organisations. e.g. talks (by U3A members), debates, mentoring and other volunteer work.

- Proactively involve men in volunteering opportunities for U3A, both internally and as representatives of U3A in community (e.g. environmental projects; work with older men in care homes, prisons)

e) **Publicity:**
- Produce a range of publicity materials and make use of channels that target and appeal to men. Promote U3A as a "can-do" organisation (get away from the old/ feminine/passive image). Humour important.

- Make contact and publicise through including online links and the people/places that men encounter in daily life e.g. bank/building society; pub/off-licence, newspaper/corner shop, barber, dentist/doctor, pharmacy, garage;

sports/fitness/social clubs, business societies, employers and any organisations with large male contingent. Note: men don't go to libraries as often as women.

- Retirement courses should mention U3A, although people who are self-employed and working for small businesses may not have the benefit of such courses.

- Raising the profile of U3A regionally and nationally should give more credibility to U3A and help with local recruitment. Consider working with other London U3As to promote regional advertising (e.g. Freedom Pass wallets; adverts on public transport).

- First point of contact can be critical and having a male member as the first contact point may help to 'legitimise' participation for some men.

f) Overcoming geographical differences in Merton:
Because of the significant social differences between the west and east of the borough, different strategies may be necessary, including different publicity, activities, venues, and collaboration with different organisations.

g) Collaboration with other organisations:
Finding adequate resources can become a problem as U3As become larger with increased demand for courses/activities, tutors and space for activities. This also puts more pressure on Committee members and others in a support role.

Instead of trying to preserve a strict autonomy or achieve universal appeal, Marvin Formosa suggests that U3As should overcome some of the 'polarities' between French/British models by collaborating with other tertiary education providers. Audrey Cloet also advocates collaborative working with complimentary organisations that have the resources we need.

Some collaboration is better done at national level for the benefit of all U3As, and Formosa points to the promising "memorandum of understanding between the Third Age Trust and The Open University… which may lead to better opportunities for older learners, to improved access of library and online facilities, participation in university courses and modules, and registering as students with reduced fees and different entrance qualifications."(p.17).

The Third Age Trust offers a number of online courses already, and these are increasing. In addition, UCL, LSE, the British Library, the BBC, and many other organisations provide live access to lectures, as well as podcasts and learning materials online, free-of-charge. Ian Searle is also compiling a directory of websites with online learning opportunities such as Coursera, edX, Udacity and TED Talks. The non-U3A Links page on our website should be developed further into a useful resource for member. In addition, links to U3A at national, regional and local levels could provide an effective publicity channel.

Consideration should also be given to collaboration with other organisations at local levels. In addition to the Workers' Education Association, local secondary schools and colleges may be a source of speakers as well as venues and facilities. Opportunities may lie also in joint-working with charities, clubs/societies, and businesses that have experience, funding, facilities and perhaps large male memberships. For example, the MensSheds movement offers opportunities to set up facilities for those with a more practical bent. Age UK has a programme for funding research other activities for older men. YMCA, ROTARY/PROBUS are examples of other potentially relevant organisations.

11. NEXT STEPS

a) Merton U3A Committee to discuss the report findings, agree a strategy to increase male membership, and appoint a member to be responsible for leading on implementation of the strategy, with a team of helpers, and working closely with other Committee members as necessary.

b) Share report findings with other U3As and personal contributors. Prepare articles for U3A Newsletter and Third Age Matters.

c) Work with other U3As at regional and national level to assist with further research, debates, development, and collaboration with organisations involved in lifelong learning, especially for men.

REFERENCES

Age Concern (2006) Working with older men – improving Age Concerns' services Report of a Research into Practice seminar, 26 September 2006. London: Age Concern England. See also report by Ruxton. S.

Age UK (2012) *Men in sheds: Age UK pilot projec*t, *April 2010-June 2012. (*Available at http://www.ageuk.org.uk/professional-resources-home/services-and-practice/health-and-wellbeing/men-in-sheds/)

Aldridge F. and Hughes D. (2012) *2012 adult participation in learning survey*. Leicester: NIACE (Available at http://shop.niace.org.uk/2012-participation-survey-headline-findings.html)

Beaumont J. (2011) *Social trends 41*. London: Office for National Statistics.

Carnegie United Kingdom Trust (1993) *Life, work and livelihood in the Third Age*. Final report.

Carnegie United Kingdom Trust (1996) *The Third Age: The continuing challenge. A report to mark the end of the second stage of Carnegie's work on the Third Age*.

Chatzitheochari S. and Arber S. (2011) Identifying the third agers: An analysis of British retirees' leisure pursuits. *Sociological Research Online*, 16 (4), 3. (Available at http://www.socresonline.org.uk/16/4/3.html)

Cloet A. (2013) Personal communication.

Davidson K., Daly T. and Arber S. (2003a) Older men, social integration and organisational activities. *Social Policy and Society,* 2 (2), 81-89.

Davidson K., Daly T. and Arber S. (2003b) *Older men: Their social worlds and healthy lifestyles*. Economic and Social Research Council, Growing Older Programme. Research Findings: 12.

De Fontanelle S. and Zinkhan G. (1993) *Gender differences in the perception of leisure: A conceptual model.* (Available at http://www.acrwebsite.org/search/view-conference-proceedings.aspx?Id=7480)

Department for Business Innovation and Skills (2012) *National adult learner survey 2010*. (Available at https://www.gov.uk/publications/national-adult-learner-survey-2010).

Department for Culture, Media and Sport (2012) *Taking part 2011/12. Adult and child report*. (Available at https://www.gov.uk/government/publications/taking-part-the-national-survey-of-culture-and-sport-adult-and-children-report-2011-12).

Department for Innovation, Universities and Skills (2009) *Learning revolution White Paper*. London.

Department for Work and Pensions (2012) *Older workers statistical information booklet 2012.* London: Office for National Statistics.

Formosa M. (2012) *Four decades of Universities of the Third Age: Past, present, future*. (Available at http://journals.cambridge.org/action/displayAbstract?fromPage=pnline&aid=8656535)

Golding B. (2007) *Men's sheds in Australia: Learning through community contexts*. Adelaide, Australia: National Centre for Vocational Education Research. (Available at http://ncver.edu.au/publications/1780html)

Golding B, Mark R and Foley A (Eds.) (Forthcoming) *Learning through life*. Leicester: National Institute for Adult Continuing Education.

Greater London Authority (2012) *London Ward Atlas* (Available at http:/data.london.gov.uk/visualisations/atlas/ward-atlas-html/atlas.html)

Greater London Authority (2013) *London DataStore: Borough profiles*. London: Greater London Authority Intelligence Unit. (Available at http://data.london.gov.uk/datastore/package/london-borough-profiles)

Hebestreit L. (2006) *An evaluation of the role of the University of the Third Age in the provision of lifelong learning.* Unpublished Doctor of Education thesis, University of South Africa (available at www.Hebestreit_RoleOfU3AinLifelongLearning.pdf)

Hughes M. (2010) *Social trends 40.* London: Office for National Statistics.

John Lewis Partnership *Men in sheds*. John Lewis Retired Partners 'Connections' Magazine 2012 date?

Jones R. (2013) Remembering my hat. Blog on 'Ageing masculinities ' seminar, 14 February 2013 (Available at http://rememberingmyhat.wordpress..com/2013/02/14/ageing-masculinities-seminar-part-1/)

Kane T. (2013) Half a shandy and a packet of crisps. *Time and Leisure* April 2013 p.8 (Available at http://www.timeandleisure.co.uk/blog/80-blogs/2348-half-a-shandy-and-a-packet-of-crisps.html)

Laslett P. (1989) *A fresh map of life: The emergence of the Third Age*. London: Weidenfeld and Nicholson.

Lofts H. *Measuring national well-being — Older people's neighbourhoods, 2013*. Office for National Statistics.

London Borough of Merton (2009) *Merton Case: A profile of Merton 2009.* (Available at http://www.merton.gov.uk/community-living/background_and_context_final-aug-2009.pdf).

London Borough of Merton (2010) *Merton Borough: Ward profiles 2010.* (Available at http://www.merton.gov.uk/community-living/areas-wards/wards.htm).

Margrett J.A. and Marsiske M. (2002) Gender differences in older adults' everyday cognitive collaboration. *International Journal of Behaviour and Development,* 26 (1): 45-59 (doi:10.1080/01650250143000319).

Mark, R. and Soulsby, J. Soulsby J. (Forthcoming) Chapter in Golding et al (Eds).

McFall S.L. (Ed.) (2012) *Understanding society: Findings 2012.* Institute for Social and Economic Research, University of Essex, with Economic and Social Research Council and National Centre for Social Research.

McNair S. (2009) *Demography and lifelong learning.* IFLL thematic paper. Leicester: National Institute for Adult Continuing Education.

McNair S. (2012) *Older people's learning in 2012. A survey.* Leicester: National Institute for Adult Continuing Education.

McSporran, M. and Young, S. (2001) Does gender matter in online learning? *Association of Learning Technology Journal* 9(2) (available at http://core.kmi.open.ac.uk/display/14247)

Menssheds UK (2013) (Available at http://menssheds.org.uk)

Midwinter E. (1996) *Thriving people: The growth and prospects of the U3A in the UK.* London: U3A on the half of Third Age Trust.

National Association for Single Sex Public Education (NASSPE) (2012) *Conference paper for Eighth International Conference (NASSPEVIII)*, 20-21 October 2012. Houston, Texas. (Available at http://singlesexschools.org/research-brain.htm).

Office for Economic and Cooperation and Development (2012) *Education at a glance 2012: OECD indicators.* Indicator C6: How many adults participate in education and learning? (doi:10.1787/eag-2012-28-en).

Office for National Statistics (2010) *Subnational population projections by sex and five year age groups,*Table 2c

Office for National Statistics (2011) *Internal migration by local authorities in England and Wales mid 2011.* Part 1: Moves broken down by broad ages into and out of local authorities in London (Merton is Table 2b, Tab OOBA). London: Office for National Statistics.

Office for National Statistics (2012a) *Older workers in the labour market.* London: Office for National Statistics.

Office for National Statistics (2012b) *Pension trends*. London: Office for National Statistics.

Office for National Statistics (2013a) *Census 2011*. (Available at http://www.ons.gov.uk).

Office for National Statistics (2013b) *Measuring national well-being - older people's neighbourhoods*. London: Office for National Statistics.

Open University (2013) (available at www.open.ac.uk/) and email 7th June from Andrew Lewis, OU Information Office.

Perren K., Arber S. and Davidson K. (2003) Men's organisational affiliations in later life: The influence of social class and marital status on informal group membership. *Ageing and Society*, 23: 69-82.

Price, L., (2006) Gender differences and similarities in online courses: challenging stereotypical views of women. *Journal of Computer Assisted Learning*, 22(5):349-359

Randall C. (2012) *Measuring national well-being - Our relationships*. London: Office for National Statistics.

Russell L. (1973) *Adult education - a plan for development.* Report by a Committee of Inquiry appointed by the Secretary of State for Education and Science under the chairmanship of Sir L. Russell. London: Department of Education and Science.

Ruxton S. (2007) *Working with older men: A review of Age Concern Services* London: Age Concern.

Skipton Building Society (2012) *Retirement? What retirement?* Press release 28/11/12 (Available at http://www,skipton.co.uk/press_office/publicity_campaigns/)

Skipton Building Society (2013a) *Pipe and slipper retirement? More like Zumba and hiking say retirees*. Press release 27/3/13 (Available as above).

Skipton Building Society (2013b) *It's official – men are happier in retirement than women.* Press release 22/5/13 (Available as above).

Swindell R. (1991) Educational opportunities for older persons in Australia: A rationale for further development. *Australian Journal of Education*, 35 (2), 175-186 (cited in Hebestreit).

Swindell R. (1993) U3A (University of the Third Age) in Australia: A model of successful ageing. *Ageing and Society*, 13, 245-66 (cited in Hebestreit).

Swindell R. and Thompson J. (1995) An international perspective on the University of the Third Age. *Educational Gerontology,* 21 (5), 429-44 (cited in Hebestreit).

Third Age Trust (2013a) *The U3A story*. (Available at http://www.u3a.org.uk /about-u3a/history-of-u3a.html/?start =7)

Third Age Trust (2013b) Did survey miss U3A members? *Third Age Matters*, 5 (New Year) pp 24,26.

Williamson A. (2000) Gender issues in older adults' participation in learning: Viewpoints and experiences of learners in the University of the Third Age (U3A). *Educational Gerontology*, 26 (1),49-66.

Workers' Educational Association (2013) (Available at www.wea.org.uk)

Personal contributors:

Special thanks to the following people who kindly shared their knowledge and provided references to sources of information by email correspondence and in conversation.

[Association for Education and Ageing](#) members:
- Jim Soulsby, currently ForAge Network Facilitator; also Development Coordinator for the Association for Education and Ageing. Formerly Older and Bolder Development Officer at NIACE.
- Marvin Formosa, Senior Lecturer, European Centre for Gerontology, University of Malta
- Anita Pincas, Visiting Fellow, Institute of Education, University of London
- Brian Findsen, Hamilton, New Zealand
- Howard Gilbert
- Helen Leech, Director Open Age
- Mervyn Eastman, Change AGEnts Network UK Ltd
- Mabel Muuduri, Imani
- Carol Allen, Information Co-ordinator, AEA

[Centre for Research on Ageing and Gender](#) (CRAG), Department of Sociology, University of Surrey:
- Sara Arber. Professor of Sociology and Co-Director of CRAG
- Tom Daly, Research Assistant

U3A members:
- Merton U3A members especially: Catherine Ware (who compiled the report); Judith Williams (Chairman); Ann Salvage (Medical sociologist with experience of gerontological research); Bernard Collyer (Group Leader and former Visits Organiser); Sheila Jones (former Membership Secretary)
- Dianne Norton, Merton U3A and first Executive Secretary of U3A UK. Founder of the Third Age Press
- Audrey Cloet, founder of Bath U3A, and former member of Third Age Trust National Executive Committee, including Development and Vice-Chair
- Ian Searle, former Chairman of Third Age Trust, now focusing on development of online learning facilities for U3A
- Janet Whitehouse, Vice chairman Third Age Trust and NEC responsibility for Research
- Gwen Wright, Chairman U3A London Region, and NEC responsibility for Social Inclusion and Diversity
- Members of U3As in London Region and Surrey Network (who provided data on male membership and participation)
- Chris Senior, Chairman of U3A Southeast Forum