

U3A CHAIRS' FORUM: MEETING NOTES 9 DECEMBER 2024

FROM BABY BOOMERS TO GENERATION X

81 Chairs in attendance

Summary:

Baby Boomers (1946-1964) and Generation X (1965-1980) represent distinct generational groups, with most current u3a members aligning more closely with Baby Boomer characteristics.

Discussions focused on the changes needed to attract and retain members with Generation X attitudes and behaviours, reflecting their emphasis on flexibility, independence, and digital engagement.

Recognising the generational differences, there is a need to address differing views and expectations to ensure that u3a remains appealing and relevant to a broad spectrum, spanning Baby Boomers and Generation X alike.

The following summarises the issues raised in the meeting:

1. Social media (Facebook) is seen to be an increasingly successful way of recruiting new members with some u3as reporting growth of 20% or more, associated with a positive change in the demographic profile of the membership.
2. Social media can be seen as the new word of mouth. The children of potential members tend to be the heaviest users of social media, making them a potentially important source of referral.
3. There is a tension between a message that appeals to Generation X and a focus on supporting an ageing social group.
4. The use of appropriate imagery and messaging is vital to attract new members. This needs to move away from the stereotypical portrayal of 'grey-haired groups of friends' and appeal to heavier users of social media.
5. Interest groups and activities are the main draw for both new and existing members. However, many u3as face difficulties finding group leaders and in starting new groups. Suggestions made to address this included the wider use of paid tutors.
6. A lack of members' confidence in using technology is seen to be a significant problem and may stop them from taking on group leader and committee roles.
7. Established groups can become stale and exclusive, being described as a 'group of friends' rather than a 'friendly group.' This highlights the need for groups to remain fresh and welcoming to new members.
8. Being responsive to member interests and encouraging participation fosters enthusiasm which, in turn, leads to positive word of mouth and broader engagement.
9. There is a shift from typical learning-based activities to more social and interactive activities, potentially contributing to wider member engagement and supporting membership retention.
10. Change is recognised as being inevitable and there is a willingness to engage with Generation X attitudes and behaviours. However, attitudes within u3as can differ widely, with some reporting that members are resistant to change or are waiting for newer members to take over, whilst others recognise that potential members may be alienated by what might be seen as more traditional approaches.
11. The success of a u3a often relies on just a few individuals. However, Generation X members are more likely to appreciate simple, task-orientated, time-flexible roles raising the questions as to whether u3as will remain successful if they continue to depend on singular, committed individuals.
12. u3as look to the Trust for support and ask whether the newly created strategy groups such as 'Next Gen' are aligned with the views that have been expressed.

PRESENTATION: [\(link to slides\)](#)

The meeting opened with a brief overview of Baby Boomers and Generation X:

Slide 1 – Introduction: Baby Boomers (1946-1964) and Generation X (1965-1980) slide encapsulates the significant societal changes. The presentation focused on the generational shifts most relevant to u3as' operations and membership.

Slide 2 – Attitudes Over Age: The differences between generations are driven by attitudes and behaviours rather than strict age brackets. Factors like cultural upbringing, education, and personal experiences shape these distinctions. Calendar dates, such as the winter of 1963, serve as markers but do not define generational traits.

Slide 3 – Generational Differences Relevant to u3as: Key differences in attitudes and behaviours likely to affect u3as include:

- **Social media usage:** Generation X prefers recommendations via digital platforms.
- **Engagement:** A preference for diversity, flexibility, and independence.
- **Retirement views:** A focus on personal growth over relaxation.
- **Volunteering:** A shift towards valuing flexible and task-oriented roles.

Slide 4 – Broader Societal Trends: Certain trends cut across generations, influencing u3as more widely:

- Increased use of technology.
- An emphasis on physical, mental, and social wellbeing.
- Growing care responsibilities and single-person households.
- Declining interest in volunteering.

Slide 5 – New Membership Behaviours: Data from Worcester u3a highlights diverging behaviours between the 20% of newer, active members and the remaining 80% who are more aligned with traditional preferences. Characteristics of the more active members suggest:

- Greater involvement in physical activities.
- Reduced interest in traditional groups.
- Stronger preference for online payments.

Slide 6 – Areas for Change: Proposed changes align with generational shifts:

- **Social media and imagery:** Modernise u3a's image and target potential members effectively.
- **Activity offerings:** Focus on Generation X interests and address challenges in starting and leading new groups.
- **Flexibility in volunteering roles:** Introduce shared, flexible, less demanding roles.
- **Digital systems:** Expand electronic payments and online booking options.
- **Climate for change:** Work with members to address resistance to new initiatives.

Slide 7 – Questions for discussion:

1. How important is it to change?
2. In which areas are the greatest changes required

DISCUSSION:

Social media and positioning

The role of social media in growth: Several members reported significant membership growth, with some u3as seeing a 20% increase in the past year accompanied by a positive demographic shift. This growth was largely attributed to the effective use of Facebook. One speaker emphasised the importance of being responsive to what people want and need, noting that this responsiveness underpins success.

Different approaches to social media: Two u3as shared their distinct strategies for leveraging Facebook. One focused on daytime activities, while the other prioritised evening options, such as book clubs, theatre trips, concerts, and weekend walking groups. These examples highlight the

importance of offering activities beyond the typical Monday-to-Friday, 10-to-4 schedule, with speakers noting that evening and weekend options enhance u3a's image and appeal.

Evolving word of mouth: While word of mouth remains a valuable recruitment tool, it is less effective with younger audiences like Generation X and Millennials (1980-1996). These groups are heavier social media users and may not consider joining u3a themselves but are more likely to recommend it to their parents. This generational shift in referrals requires u3as to 'break the cycle of your own thinking' and find ways to connect with this younger demographic through their preferred platforms and interests.

Cross-generational initiatives: One u3a demonstrated the value of crossing generations by engaging with primary schools, creating teaching resources such as Welsh-language stories and science demonstrations by ex-scientists.

Messaging and imagery: Speakers acknowledged the challenge of reconciling messages appealing to Generation X with those supporting older age groups. Comments stressed the importance of rethinking imagery and messaging. Pictures of grey-haired members chatting may seem dull to external audiences, with speakers advocating for short videos and visuals of members engaged in activities that would interest Generation X. Similarly, messaging should move away from "retired from full-time work" to questions like, "Do you have free time to be involved in the kind of activities we do?" to resonate better with Generation X.

Adapting digital platforms: The need to optimise websites for mobile users was also emphasised. One speaker noted, 'When users stumble on our websites, it is often via their phones, not a PC or laptop. If there's too much text, it looks terrible on mobile devices.' Ensuring websites are mobile-friendly is critical for engaging potential members effectively.

Interest groups

The importance of interest groups: Groups are a key attraction for u3a membership, with a broad range of activities essential for engaging both new and existing members. Many u3as expressed a desire to offer more groups but face challenges in setting up new ones, particularly due to a recurring difficulty in finding leaders.

Challenges in leadership: Speakers highlighted that successful groups have closed because replacements couldn't be found. While members enjoy participating, they are often reluctant to take on the responsibility of leadership. One speaker noted that the core group of leaders and committee members are already 'working flat out.' Many members face competing commitments such as travel and family responsibilities, making them less willing to step into leadership roles and this continue to fall predominantly on longer-standing members.

Encouraging members to start new groups: One approach to addressing this challenge involves actively asking members what they want and then making it happen. This proactive method was reported to generate positive responses and increased participation. Another strategy is to identify someone to drive a new group initially, using taster sessions to gauge interest and inspire members to take on organising the group. This method has proven successful, with one u3a increasing its activity groups from 40 to 80 based on member suggestions.

Shared leadership and paid tutors: Team-led groups, where leadership is shared among members, were suggested to ensure continuity if one leader is unavailable. Additionally, the possibility of employing paid tutors was discussed. Several u3as already pay tutors for activities such as Pilates, languages, and singing. However, challenges include finding suitable tutors and ensuring they are self-employed with appropriate insurance. See: [Section 10.8 Finance matters guidance](#)

Technology use and skills development: A recurring challenge for u3as is the lack of technological skills among members, with one speaker observing that many 'run a mile' when technology is mentioned. The suggestion was to run technical skills courses covering topics such as using computers, mobile phones, WhatsApp, and similar tools.

Approaches to technology skills training: Various options were discussed, including workshops, computer clinics, and courses offered by external organisations like AbilityNet and local libraries.

However, u3as have found running unified courses challenging due to the diversity of members' skill levels, the variety of technologies, and differing operating systems. Given these difficulties, individual tuition or smaller, more tailored sessions may be a more effective approach.

Engaging members

Revitalising groups: Some u3as face challenges with cliques and declining group membership. Often groups dominated by long-standing members have become close friends and are sometimes unwelcoming to newcomers. Speakers stressed the importance of distinguishing between a “group of friends” and a “friendly group.” Engaging activities and an inclusive atmosphere are key to attracting new members and preventing groups from becoming cliquey.

Avoiding group stagnation: Groups can become stale, prompting leaders to step down and the group folding altogether. To counter this, leaders will need to ensure their groups remain interesting and engaging. As one speaker noted, “If the group is interesting, it will attract members.”

Effective communication and engagement: Communication was highlighted as critical for keeping members engaged. One speaker shared their approach: sending twice-weekly emails to all 750 members and maintaining a “what’s on” page on the website. This communication highlights activities, mentions members by name, and ensures everyone feels part of the community, reducing isolation and encouraging participation.

Promoting active participation: Speakers emphasised the importance of engaging members and reinforcing the self-help ethos of u3a: ‘Ensuring everyone understands that the u3a works best when all members actively participate.’

Broadening activities: Many members enjoy activities that extend beyond traditional learning-based pursuits, embracing more social and interactive opportunities. One speaker remarked, ‘It’s about enthusiasm! Word of mouth gets around—it’s groups that are ‘for members by members’ that generates the interest.’

The inevitability of change

Acknowledging the inevitability of change: There was clear agreement on the inevitability of change, with one speaker stating, ‘We’re going to change whether we like it or not,’ prompting the question of what specific changes are required. Some members emphasised that simplicity is key to encouraging participation, cautioning that overly difficult processes can deter engagement.

Shifting attitudes and resistance to change: A change in attitude was identified as crucial, with one speaker commenting, ‘Once the changes in attitude are there—I’ll exaggerate—but everything is possible.’ However, other members reported resistance to change, with some u3as relying on the notion that changes would occur ‘organically,’ and commenting that newer members may lose interest if their ideas are not supported. A speaker noted, ‘new people [to their area] are actively seeking opportunities,’ suggesting they might not join if the organisation remains static.

Example of success: One u3a reported that their membership had remained static at 280 for 35 years. However, a shift to a more proactive approach resulted in consecutive annual membership growth of 20%, with Facebook playing a significant role. Unnecessary change, however, was cautioned against, as it risks alienating existing members or creating friction with established groups.

Dependence on individuals and central support: The diversity among u3as means that challenges vary by size and circumstances—smaller u3as can face different challenges compared to those with 1,000 members. Speakers highlighted the heavy reliance on a few dedicated individuals to drive growth, with some describing it as a ‘full-time occupation’ and looking to the Trust for support.

Role of the Trust and Strategy Groups: Questions were raised about the Trust’s role in supporting these changes and whether the ‘Next Gen’ strategy group is aligned with the perspectives shared in these discussions.