The contribution of qualitative methods for identifying the educational needs of adults

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Abstract

This study addresses the contribution of applying qualitative research methods for identifying the educational activities planned for adults. The paper is based on the experience gained during in-depth interviews with 39 elderly and 33 middle-aged participants, by purposive sampling method and maximum variation technique, within a needs analysis study in phenomenology design. Qualitative research techniques for assessing the opinions of elderly and middle-aged adults about the necessity and content of training programmes for ageing, and preparing androgogy-based and need-based educational programmes in compliance with the results was evaluated. In the scope of the study, the fact that applying qualitative research techniques such as in-depth interviews with exploratory questions and observation facilitated reaching more descriptive and more elaborative results compared to applying the quantitative research techniques such as questionnaires with short questions and numeric data anlaysis in the surveys on adults with divergent life experience, traits and expectation was concluded.

Keywords: Adult, ageing, elderly, qualitative research methods.

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1. Introduction

Since the late 19th century, a lot research has been done on the pre-adulthood of human life and theories have been developed. Despite their biological, psychological and social differences, it is considered that all children have passed the common developmental periods called prenatal, infancy, first childhood, middle childhood, prepuberty and puberty (Onur, 2011). Despite Erikson claiming that a person's development process lasts for a lifetime, probably because some prominent scientists such as Freud and Piaget asserting that development is completed after puberty, no efficient research on adult development and the life cycle as a whole has been carried out (Cuceloglu, 2015; Onur, 2011). However, life-span developmental psychology, which accepts development as a lifelong process starting from fertilisation and ending with death, and claims developmental process and learning continue peculiar to adulthood, despite not being explicit as in childhood, has become increasingly important since the 1970s (Cuceloglu, 2015; Honzik, 1985). Although it is accepted that in adulthood, there is a slowdown in the problem solving ability compared to the youth period, finding out that the different systems age at different rates and some aspects of intelligence may be in progress or remain stable along with ageing, and determining that the advantages of experiences hinder the loss of mental capacity and cumulative intelligence continues to develop, caused researchers to review their claims (Cuceloglu, 2015; Onur, 2011).

With the acceptance that development continues through the individual's life, education has also turned into life-long education. Social developments such as shortcomings and problems in formal education, living standards changed by economic and technological developments, new needs imposed by globalisation, increasing and ageing population, and migrations and change in family structure (Duman, 2007) have made adult education more important than ever for individuals. These developments have raised the interest on the issue of how adults learn, and how adult learning differs from children's learning. The concept of andragogy also emerged as an adult learning model in this period, assuming that adults differ in their needs-based and self-directed learning (Tusting & Barton, 2011). The model is defined as a discipline in which theories, processes and technologies of adult education are addressed, and as the art and science of helping adults learn (Duman, 2007). According to this model, adults want to know why and what they will learn. In this context, it is important that adults have to make out whether they need the information to be learned and if the information can be used to solve problems they face and to keep their social roles. In addition, adults and especially elderly people want to use their experience and knowledge in the learning process actively; and be responsible for their own learning. This is an indication of adults' taking action that is self-motivated, self-directed and problem-centred.

These traits can be interpreted as adults instinctively opposed to the training method described by Freire (1991) as the banker education model. Freire claims that the learners turn into containers or vessels that need to be filled, thus education becomes an act of depositing; the teacher becomes the depositor and the students become the deposits in the systems where the teacher is an active narrator. It should be kept in mind that adults who think they are sufficiently filled with their individual background and experiences will not accept being passive receivers if that 'fullness' is not taken into account, and they will use their experience in the learning process at least through the dialogue that Freire puts emphasis on. At the same time, they will regard the experiences that they share with 'the others' as the most precious source of information. The demand by adults to know what and why they learn, and their problem-centred learning requests also coincide with the notion of taking action that Freire defines as praxis. It should be known that adults will not be willing to learn the information they will not be able to tap into or use in transforming their lives while solving problems or adapting to new situations. Therefore, the success and the sustainability of programmes to be applied to adults depends on their ability to respond to individual needs (Simsek, 2002).

The rapidly ageing world population is constantly facing new developments due to the improving technology and swiftly increasing knowledge, henceforth new learning needs arise both to cope with these developments and to adapt to the old ages. There is a need for research to determine what,

why and how people want to learn to cope with the crises of ageing and the last years of life (Boulton-Lewis, 2010). In addition, educational programmes including useful and desirable economic, political, cultural, social and personal knowledge and skills in order to meet the needs of the old ages should be developed (Akyuz & Keser, 2015; Dulger, 2012; Gehmacher, 1978; Kilavuz, 2002; Kosar, 1996; Uzunboylu & Hursen, 2011). The research that addresses the issues, needs and problems with an andragogical point of view, and aims to find scientific solutions and provide a more independent and self-sufficient living conditions for the elderly in their ageing process is also necessary for the social policy makers (Cornett, 2011; Knowles, 1996; Komsu, 2014).

While Turkish society takes the understanding and values of contemporary Western civilisation in matters such as state regulation, administration, laws, education and army, it has a religion-centred traditional culture in social life issues such as child-rearing, family relations, neighbourhood and moral understanding (Cuceloglu, 2015). Therefore, due to the contradiction and conflicts between the values of traditional and –modern culture, it is not suitable to evaluate Turkish society and the ageing peculiar to Turkey with the concepts of Western culture. At this point, there is a need for moving beyond transferring the foreign resources, and efforts to develop theories by treating our ageing and processes in a unique way within the frame of our social and cultural dynamics. The intellectual preparations and action plans in order to define and solve the problems of that new society, which is transforming through ageing, academic studies that will stimulate and facilitate the formation of new social and political structures, realistic and outcome-oriented approaches and efficient living philosophies and models need to be developed and carried out (Dulger, 2012; Komsu, 2014). For this reason, a comprehensive research using qualitative research methods to assess the opinions of elderly and middle-aged adults about the training programmes for ageing has been launched, and the very precious data and findings which would be very difficult to provide with the quantitative research methods were gained.

2. Method

The aim of this study is to address the contribution of applying qualitative research methods in identifying the educational activities planned for adults. The study is based on the experience gained during in-depth interviews with 39 elderly and 33 middle-aged participants determined by purposive sampling method and maximum variation technique within a needs analysis study in phenomenology design.

The mentioned study aimed to determine the opinions and needs of the elderly and middle-aged individuals regarding the preparatory education for ageing. Since the systematic research related to the elderly does not go back a long time, much information about old people is still hidden (Genc & Dalkilic, 2013). Along with this limitation in the literature, the losses in the perception levels of elderly that may stem from the age of individuals can also force data collection by quantitative methods (Icli, 2010). However, qualitative methods enable an in-depth approach to understanding and exploring social or human problems attributed to individuals or groups (Creswell, 2006). According to Freeman (1997), compared to the quantitative perspective, the qualitative perspective raises the deep-seated fact to the surface rather than statistical data obtained from the simple questioning, by providing a more insightful and more comprehensive view in the analysis of the community and the individual (Freeman, 1997 as cited in Yapici, 2008). In addition, how the meanings emerge as reflections of the interaction between the individual and the environment requires in-depth observation and can only be interpreted with qualitative methods (Uzuner, 1999 as cited in Ozmete, 2008). Therefore, the researcher has inclined to use qualitative techniques with the thought of a research that would deal with ageing, a very individual experience, should be carried out in detail.

The fact that ageing and the situations, problems and needs in the ageing process are directly or indirectly related to many cases, facts and phenomena bring about many difficulties in drawing the boundaries of the related studies. At the beginning of these difficulties comes the data about the elderly that should be obtained in detail and interpreted in a multidimensional way. Interviewing is a

very effective method used to reveal people's perspectives, experiences, emotions and perceptions among qualitative data collection methods (Bogdan & Biklen, 1992 as cited in Yildirim, 1999). For this reason, in that phenomenological study, in-depth interview technique provided mutual and effective communication with the individuals who were separated into two groups as middle aged and old aged adults in the process of obtaining the data.

2.1. Working group

The population of the research is composed of middle aged (45–59 years old) and old aged (60–74 years) individuals living in five of the central districts of Ankara (Cankaya, Yenimahalle, Kecioren, AltindaG, Mamak). These five districts were determined according to the socio-economic zoning map prepared by the Devlet Istatistik Enstitusu (State Institute of Statistics) (abrogated) in 2004. According to this map, Cankaya is taken at the upper socio-economic level, Yenimahalle and Kecioren are at the middle socio-economic level and Mamak and AltindaG are at the low socio-economic level. In addition, these districts have the highest population among the metropolitan districts of Ankara and represent different geographical and socio-spatial characteristics (Sahin, 2015).

Samples of the research included the participants who were interviewed. In accordance with the aim of the study, the maximum variation technique, one of the purposeful sampling methods of non-probability sampling types, was used for selecting the participants to be interviewed (Buyukozturk, Kilic-Cakmak, Akgun, Karadeniz & Demirel, 2013; Yildirim & Simsek, 2006). Through the literature review, variables have been identified that will allow the researcher to sample as many different cases and socio-demographic attributes as possible within the population. In addition to the criteria of easy accessibility and volunteerism, all different cases and characteristics within the population in terms of socio-demographic attributes have been tried to be included as much as possible. The search for the interviewees continued until the satisfaction of the data; in other words, until any new categories were not emerged from the answers given by the participants; in the end, 39 elderly and 33 middle-aged individuals were interviewed.

2.2. Data collection tools

Semi-structured interview forms were used as a means of collecting research data. The first step was collecting data from elderly individuals. After a comprehensive literature review and setting the conceptual framework, an interview form was prepared, including research questions apprpriate for the research purposes. At this stage, it was aimed to obtain as clear answers as possible by means of direct or indirect questions. The form was presented to three academicians and evaluated in terms of scope, content and language, and necessary corrections were made accordingly. Before the interviews with elderly participants, pilot interviews were conducted with three individuals (ages: 62, 67, and 74) who would not be included in the working group. This helped the researcher check the intelligibility of the questions and their compliance with the study objectives. Expressions in which individuals would have difficulty in understanding were corrected and the interviews started.

As for the second data collection phase of the study, in-depth interviews were conducted with middle-aged adults through a second semi-structured interview form, which was adapted for middle-aged interviewees from the form for the elderly. Since the main target of the study is the middle-aged individuals who are ageing, it was noted that the items in the second form were more deliberate and detailed. The second form was also presented to three academicians and evaluated in terms of scope, content and language and necessary corrections were made accordingly. Before the interviews with the middle-aged participants, pilot interviews were conducted with three individuals (ages: 45, 51, and 54) who would not be included in the working group. This helped the researcher check the intelligibility of the questions and their compliance with the study objectives. Expressions in which individuals would have difficulty in understanding were corrected and interviews were started.

Provided that the interviewee allowed the researcher, interviews with both the groups were recorded with the recording device. When the interviewee did not allow to record, the researcher took notes during the interviews. At the beginning of the interviews with both the groups, questions about demographic information were asked in order to determine the personal characteristics of the participants, to understand their family structures and to determine the direction of the questions to be asked. After that, questions about the focus of the study were asked. These questions aimed to reveal the perceptions of the participants about ageing, old age problems, the strategies to cope with these problems, preparation for retirement and old age.

2.3. Collecting data

The data required for the study were collected through in-depth interviews from two different groups, elderly (60–74 years) and middle-aged (45–59 years). Interviews were started after identifying demographic variables that could reflect all the different cases within the population, in order to ensure the maximum variation in sample selection. The elderly were interviewed during October–November, 2016; and the middle-aged were interviewed during February–March, 2017. In order for the researcher to gain experience, and to take the advantages of being able to observe the lives and emotions in more detail into consideration, the interviews in both the groups started with close relatives and neighbours. The search for samples continued after the interviews from the close vicinity of the researcher; and new participants were reached through the social media, and through students and colleagues of the researcher. The number of interviewees was determined by the repetition of the emerging concepts and categories. Therefore, interviews were continued until new categories were not revealed, and 39 elderly and 33 middle-aged persons were interviewed.

The shortest meeting with the elderly lasted 50 min while the longest was two hours and 35 min. Although the priority was on one-on-one interview, there were cases in which some relatives of the participants who had been informed about the interviews wanted to monitor the interviews. Upon the participants' insisting that they would express themselves better, these guests were allowed on the condition that they would not interrupt the interviews. At the end of the interviews, participants were asked if they knew anyone appropriate for being an interviewee. The spouses of the three, the brother of one, and the neighbours of two were included in the study.

Since the middle-aged group was the main target of the study, they were asked to give more detailed answers. All participants were interviewed one-on-one, and all but three allowed voice recording. The shortest interview lasted 70 min and the longest was two hours and 45 min. Participants were asked whether they knew someone appropriate for being a sample; the spouses of two, the brother of one, and the neighbor of one were included in the study.

A few of the elderly stated that some of the topics were sensitive to them, such as the deaths of their spouses, divorce or marriage, and that they did not want to be asked questions about these issues, and the necessary sensitivity was shown. However, despite this sensitivity, as interviews progressed, some of them gave information about these subjects saying 'you did not ask, but if you turn the recording off, I will tell something'. This 'off the record' information was not included in the study, in order to keep the promises made to the participants. Since a female interviewer never married and a male participant's wife died at a very young age, they preferred not to talk about marriage and spousal issues. Eight of the participants did not allow voice recordings, thus written notes were kept in interviews with them. Although two people did not want voice recording at the beginning, a short time after the conversation started they said, 'I talk a lot, you have to write continuously, it becomes difficult, turn on the recording'.

Although the interview seems to be an easy data collection method in which questions are asked and answers are recorded, as Yildirim and Simsek (2006) drew attention, it requires many dimensions such as skill, sensitivity, concentration, understanding, foresight, mental alertness and discipline. In addition to making efforts to collect appropriate data for the purpose of the study, interventions had

to be made to the participants who love to talk not to digress, and to the participants who do not like to talk to give detailed information. Efforts were also made to ensure that these interventions did not disrupt participants' morale and motivation, and the favourable atmosphere of the negotiations was not dissipated. When it was realised that the participants were bored, the researcher tried to collect their attention by short breaks or going through different questions. Care was taken to ensure that the interviews were conducted in a conversational atmosphere as much as possible, and when the participants felt that they were tired, the researcher provided information about the work so that they could rest.

As the elderly participants considered the interviews as an accounting of the past, they were usually touched, sometimes cried and a few of them even collapsed in sobs. Among the middle-aged people, especially those who had stayed with their elderly relatives and even had taken care of them used emotional expressions while telling the memories of the elderly who were often their mothers, fathers or spouses. If they died recently, the interviewees cried. In these cases the researcher offered to end the interview, but after short breaks, the participants wanted to continue the interviews, and said that the conversation seemed like a therapy and that they were discharging themselves. It was also observed that the interviews had a catharsis effect on those individuals who complained about being lonely and unable to have a heart-to-heart talk with their immediate family, especially those who tried hard to look strong in order not to distress their children after losing their spouses. Some of these participants stated that it was a relief for them to speak with someone who was away from their own environment saying 'I had not realised so far, but those tears meant that I was enduring in silence'. The time from the very first tears until the participants began to smile was the most difficult time for the researcher, even the moments when he regretted starting such a study.

At the end of the interviews, almost all the participants stated that they had a very effective interview, despite the anxiety and excitement they had suffered at the beginning. They also expressed that they had the chance to observe the issues they had not thought so far or they had thought but had not reflected yet; and it was high time to realise that they had to make new decisions. After the completion of the interviews, the records obtained from the interviews were transcribed by the researcher without changing their contents.

2.4. Analysis of data

Interpretive phenomenology, one of the qualitative research models, was used to evaluate the educational needs of the ageing individuals. Phenomenology is descriptively examining the perceptions and the ascribed meanings through the mentioned experiences of the participants (Gocer, 2013). At the analysis stage, participants' expressions were coded by using open coding method and seperated into main and sub-categories, until a new category did not appear. The dataset was read repeatedly at different times to ensure that there were no missed points. The coding and re-coding process continued until all the data were classified clearly, and the categories were saturated and regular (Lincoln & Guba, 1985; Strauss, 1987 as cited in Miles & Huberman, 2016). The emerging themes and their relation to each other were determined by axis coding and pattern diagrams were created. The diagrams were interpreted in a descriptive manner, supported by the direct quotations of the participant expressions and the observation notes of the researcher. Finally, by means of selective coding method, the themes and categories were related to the preparatory educational needs of ageing adults, and the relations were interpreted.

3. Findings

In this section, the contribution of applying qualitative methods in the study will be discussed. First, qualitative methods have provided an in-depth approach to understanding and discovering social or human problems encountered in the ageing process, as described in the literature (Creswell, 2006; Freeman, 1997 as cited in Yapici, 2008). In addition, thanks to the stories shared by the participants,

elderliness could be addressed with insiders' views comprehensively. On the other hand, qualitative methods have made it very easy to reach meaningful findings in the process of collecting and analysing data. With the maximum variation technique used for sample selection, similar and different variables existing in the population and the different dimensions of the problem according to this diversity were revealed. The relations could be clarified and interpreted through open, axis and selective coding techniques, so that common or separated directions between different situations could be determined and the problems were described in a wider frame.

In the interviews made with the elderly, allowing their relatives to monitor the interviews gave the researcher the opportunity to closely observe and evaluate the natural environment and the close relationship. These observations have been used during the data and discourse analysis for forming a basis or supporting the interviews as stated by Yildirim and Simsek (2006).

Some data were also collected from the acquaintances of both the elderly and middle-aged participants. These data obtained from closely related individuals were taken into account in the analysis and whether the expressions were supportive or contradictory was checked to reveal the most realistic facts and circumstances.

In addition, participants being frequently touched, and even collapsing in sobs during the interviews provided the researcher with the opportunity to observe them emotionally in a way that could not be reached with any questionnaire application. Listening to the problems and their own ways of coping with these problems first hand helped the researcher reflect that emotional intensity in the findings of the study. The use of qualitative techniques are explicitly ideal to get sincere data.

The biggest problem that arose during the interviews with middle-aged participants was that most of the participants had not taken ageing on their agendas yet and had never thought that they were ageing as they confessed in interviews. Except for the ones having elderly relatives and especially those who stayed with the elderly and even undertook their care for a while, the participants had a very low level of awareness of ageing. This made it difficult for them to answer the questions. However, as interviews progressed and the scope and subject of the study were comprehended, they began to give long and detailed answers, considering the questions that they could not give satisfactory answers before. This also showed that, within the scope of the research, it was a right decision to apply qualitative techniques based on long interviews and descriptive questions instead of quantitative techniques based on short questions and answers.

The fact that many participants stated at the end of the interviews that they took serious lessons about an important topic which they had never had in mind before or they constantly omitted when they remembered, can also be interpreted as in-depth interviewing techniques provoke the mental process and contribute didactically to the level of participants' awareness.

The qualitative method also provided categorisation in the subjects, not aimed by the research questions, as well as a clear understanding of the self-perceptions of the individuals and the implications of the differences and similarities between the participants and the age groups. For example, although there was no direct question about age and elderly discrimination within the scope of the study, it was revealed from the participants' expressions that the elderly are respected in public and in the broader environment, while they were discriminated in close relations and in the narrow environment. Similarly, even though there was not a direct question, nearly half of the participants in the old age (f: 18) stated that at least one of their children died due to limited treatment opportunities for diseases during childbirth or during childhood. It is thought that the high infant and child mortality rates in those participants' time may have led them to have more children, and this was taken into account during the interpretation of the data. As a result, it has been seen that the elderly people are more dependent on their children and they have developed an understanding of 'I can get helped and cared by one child or the other children'. In contrast, the middle-aged individuals who got married in the years that infant and child mortality rates declined and health conditions improved have fewer children. These individuals, in general, have expectation of being venerated but yet do not think of

laying a burden on their children for their problems in their old age. These inferences are considered to be an important consequence of qualitative studies that are not bounded by survey questionnaires, unlike the quantitative studies. Because quantitative methods do not allow individuals to express themselves and give detailed answers at an adequate level, and participants may feel restricted with standardised questionnaires (Yildirim, 1999).

Another example relates to the fact that the subjective self perceptions of individuals are quite different from the objective judgments. Before the interviews started, the participants were asked about their financial situation. However, on many occasions, conflicting statements were realised about economic levels, and it was understood that in both the age groups, participants tend to hide their incomes and to understate their financial assets. For instance, an elderly participant who stated that he had to peddle because he had a disabled daughter to be looked after, thus he could not live on his pension stating, 'We could not be on a lucky streak, son, we are poor, my daugter is ill, how can I make a living with pittance?' gave such an answer to a question at the end of the interview:

..the thing that keeps my head busy the most is to buy a house for my disabled daughter. I have 5 children, I sold some of the fields in our village, I added some on the sum, I bought a house for each of my four children. I rented them, my children will inherit when I die. However, I couldn't buy a house for my disabled daughter. I save the money I earn from the rents, peddling, and floristry. I have a little deficit though. If I am able to buy her house, I won't die in disappointment.

That participant tried to explain that he had to maintain his lifestyle as a low-incomer by complaining about the cheapness of his houses: 'I have four new houses but because they are in Mamak they are not worth a half flat in Cayyolu, having houses does not make a person rich'. In quantitative researches, the difference between the subjective self-perceptions and the objective judgments cannot be realised through questionnaires easily.

The final example is on making inferences about the reasons for the differences and similarities between the study groups. In particular, the personal stories of the elderly individuals have provided examples showing that the conditions of education, work and marriage were quite different from those of today's conditions and of each other. Nowadays, being even a high-school graduate does not seem to be enough to find a job, there were illiterate-elderly participants who worked as public workers and got retired. In addition, the elderly individuals stated that they were employed at the age of 16 at their own time and they could retire in their 30s. Likewise, there were elderly participants who married at a very early age and became grandparents towards the end of their 30s. However, nowadays, the 30s have become the ages of getting a job and planning a marriage. On the other hand, the retirement mentality of the elderly group is not in the form of a termination of working life but of the entitlement of pension. Many older people who had the right of being retired at an early age and had been getting pensions were continuing active-working life either in their old or new jobs. However, when they were asked 'When are you going to retire?' they responded 'I have already been retired for years'. As for the middle-aged individuals, they were expecting to retire and to terminate working as soon as possible after meeting the retirement requirements. Those who do not want to break away from active working tend to continue their current jobs instead of changing jobs.

After all these findings and interpretations, it is thought that the upcoming analysis of the study will most probably provide more data and findings that are not easy to be reached by quantitative methods. Thus, it is a very accurate decision to use qualitative methods in a research related to the ageing process, which is experienced individually. It is also thought that features of qualitative researches such as researching, understanding and analysing the social phenomena inductively in their own environment will provide a basis for the theory-establishing studies required in the field (Yildirim, 1999). Yildirim (1999, p. 10) explains 'establishing theory' as a modelling work that explains the relation of some previously unknown results, based on collected information. The formation of the

theoretical framework will be an important basis for more extensive and wide-sampled quantitative studies.

4. Conclusion

It is necessary to deal with the ageing process, which is very individualistic and characteristic to each society, in a unique way, away from prejudices, independent from market expectations, with humanistic and progressive approaches. There is a need for scientific studies to evaluate the ageing process specific to Turkey and Turkish society within the framework of social and cultural dynamics; to identify the current situations, problems and needs through detailed interviews and observations; and to develop realistic and resultant approaches and solutions. In the studies that aim to identify problems and needs and whose sample is composed of adults, the low level of consciousness and awareness of the participants, their regrets about past experiences, the concerns about the future, self-perceptions, personality traits and momentary feelings cause their answers to be short, cursory, unrealistic or biased. The studies in which qualitative research techniques are used extensively can preclude these problems by observing the participants in their social context, asking questions that will detail the answers, interpreting the similarities and differences between the answers of adults with different characteristics, experiences and expectations in their own contexts, and they can meet a very significant need for the literature.

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