# Literature Review

This chapter reviews a range of literature covering the teaching of adults, self-directed learning and the concept of ‘andragogy’. The intention of this review is to collect information to understand how adults learn, so that it can inform the design process of my software. This section will also help decide which kind of application I build, and help shape the potential features and requirements that will then be put out to a survey. The literature reviewed in this chapter is done so in the context of how the information provided relates to software tools that can aid self-directed learning, or how it can be adapted to do so.

## Self-Directed Learning

Self-directed learning (SDL) is the *“process by which learners manage their own learning process from beginning to end” (Knowles, 1975).* One need only perform a simple internet search for self-education to be bombarded with offers from businesses which range from small private companies to massive public institutions. The vast majority of these offers take the form of ‘e-learning’ (marketing language for ‘online’) courses which cover any number of subjects, ranging from simple ‘how-to’ videos, to lectures and courses offered by active and often highly esteemed academics. Indeed the academic industry is now investing significant resources in e-learning infrastructure to support both teaching and learning (Islam, 2013).

Aside from the market potential, or perhaps due to it, the benefits of SDL have been increasingly researched. Studies has shown that SDL is positively related to many education-related constructs: academic performance, aspiration, creativity, curiosity, and life satisfaction (Boyer et al., 2014). Additionally, college students who are taught to be pro-active self-directed learners are better prepared as employees to anticipate the needs of their organisation, and better acquire “skills, knowledge and abilities to create values for their customers, employers, and organisations” (Tobin, 2000).

The purported benefits have been marketed by myriad e-learning and self-education firms looking to create the next mega-hub of online learning. The popularity of these courses is not to be underestimated, in fact, the global online education market size is forecast to increase to $319 billion (USD) in 2025, up from $188 billion (USD) in 2019 (Research and Markets, (2020).

Self-directed learning is a legitimate method of study, the industry is fertile, and the appetite exists for tools that can enhance one’s learning. It is therefore important to examine *how* adults learn so that needs and requirements can be established, shortcomings can be identified and corrected, and the design process can begin.

## How adults Learn - Andragogy

Until the 1970s, it was not well understood that children and adults require different approaches to learning (Knowles, 1975). It was Malcolm Knowles, an American adult educator, who first formally identified the difference, and was also the first to attempt to develop a comprehensive theory of the education of adults -- a concept which he later named ‘Andragogy’, as opposed to ‘Pedagogy’, the education of children (Knowles, 1980). His theory explores how adults have different motivations and methods for learning, thus educators of adults must tailor their content appropriately (Knowles, 1980). Generally, adult education practitioners welcomed Knowles’ theory, especially satisfied that it was applicable in practice (Loeng, 2018).

The theory of andragogy has been studied extensively ever since, though it has not progressed without criticism. Critics accuse Knowles’ theory of lacking an empirical basis (Jarvis, 1984) (Davenport III, 1987), a criticism especially focussed on his ‘assumptions’, which are explored in the next section.

Further criticism accused Knowles of idealism. It points out that Knowles failed to integrate real-world social, political, economic and historical context with his notion of the individual. Thus neglecting consideration of race, gender and class – and their associated privileges and suppression (Sandlin, 2005). This view is shared by others who claim that Knowles’ work fails to critically examine society and organisations, and does nothing to challenge the status quo (Finger and Asún, 2001).

In practice, in higher education institutions, pedagogical education has underwent a significant shift towards community-based learning models (Rovai and Jordan, 2004). During this same time, social networks such as Facebook have gone through explosive growth, initially driven by this student age group, which has led to a pairing of social media and education (Deng and Tavares, 2013). This naturally leads to the question of whether the same type of community-driven learning could be integrated with Knowles’ theory -- perhaps an area for future research to explore. In reality, many self-education systems do have some kind of social or community aspect to them which are examined in a later section of this chapter.

## Knowles’ 5 Assumptions

Knowles published “The modern practice of adult education: from pedagogy to andragogy” (1980) in which he detailed 4 assumptions about the way in which adults learn (as opposed to children). These assumptions address personal characteristics that, Knowles argues, are common among adult learners. The 5th assumption was added in a later work (1984), and the collection is displayed in the diagram below (fig 1).

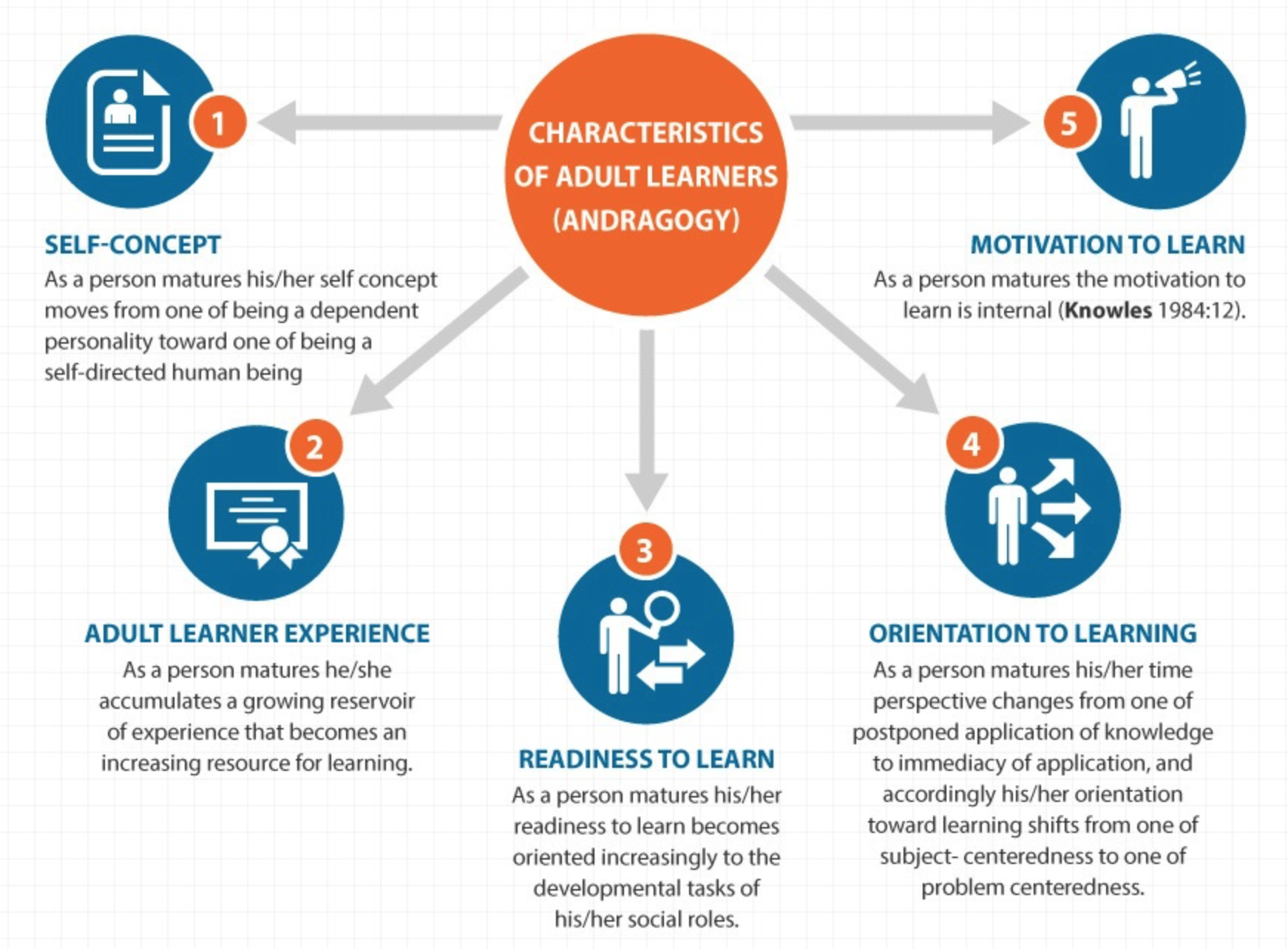


Figure 1 - Knowles' 5 assumptions of adult learners. Credit: https://elearninginfographics.com/adult-learning-theory-andragogy-infographic

From these assumptions can be extracted useful methods and guidelines which, when followed, can give more meaning and impact to learning experiences for adults. In a more immediate context, these assumptions can provide me - as a software designer - a sort of imaginary proto-user who possesses some, or all, of these characteristics as requirements. This section explores how these characteristics have been refined over years of research, and how that can inform the design process.

To satisfy the first assumption, it is important that learning consists of minimum instruction and maximum autonomy. Adults acquire new information more effectively if done so autonomously [CITATION NEEDED], therefore it is important that self-directed learning tools can accommodate an autonomous learning process. [SUGGEST WHAT THAT MIGHT LOOK LIKE?]

Knowles’ second assumption proposes that adult learners naturally have more life experience. Thus it stands to reason that they typically have a wider knowledge base and are more likely to have different backgrounds, skills and experience levels in any particular subject of study. Not only that, but as age increases, the experience they have plays an increasingly important role in learning new things. Pragmatically, this means that tools to support adult learning should support a wide variety of learning methods, models and subjects to appeal to the broader user-base -- an idea which is upheld in later research (Kebritchi, 2008).

With his third assumption, Knowles asserts that adults tend to engage with learning that will benefit their social development; often we are more willing to engage with learning that can enhance skills that pertain to our social roles, of which one’s job is such an example. Application of this assumption could include features of a self-directed learning tool that emphasise networking and collaboration. Such inter-student interaction is shown to have a positive effect on learning outcomes such as course engagement, critical thinking, and individual development (Pike et al., 2011). Furthermore, the ability to support learning material from institutions that offer official certifications etc. could be a way to exploit this characteristic.

The fourth assumption contends that adults seek practical, problem-centred learning approaches. It suggests that adults learn new skills for specific practical reasons – such as encountering a problem or working in a new industry. Real-world application of characteristic could mean that lessons come in the form of real-life examples or could include some way of facilitating the application of the knowledge gained.

The fifth and final assumption says that as learners mature, their drive to gain new knowledge becomes internal. This contrasts with child learners whose motivations are often driven by external factors such as punishment for poor academic performance [CITATION NEEDED?]. This suggests that learners require a valid reason behind learning. Personal motivation could be aided with a way to track and measure progress towards personal goals.

Due to the deep user-centric insight into how adults engage with learning material, it is important that Knowles’ assumptions are kept in mind when moving to the research and design stages of this project. They will help shape the potential range of features that will be included in the requirements elicitation survey and will also contribute to the overall philosophy for the design process.

## The case for Mobile Technology

In recent years, the booming self-education sector has been revolutionised by disruptive new technologies (Mac Callum et al., 2014). Mobile technologies (encompassing mobile phones, tablets and other ultra-portable computers) have long been earmarked as a useful tool for learning (Dawabi et al., 2004). Mobile technology has been very rapidly adopted across the world, and it is now increasingly common for people to have their phone on or near them at all times. Recent statistics show that Smartphone ownership in the UK across all demographics ranges from 95% to 99%, with the sole exception of the 55+ bracket at 70% (Statista, 2020). It is fair to say that even among the oldest members of our society, mobile technology is now ubiquitous.

A major strength of these technologies is their versatility. As these technologies have advanced in power, they are increasingly assuming tasks that were traditionally the exclusive domain of PC’s and laptops [CITATION?]. The potential for flexibility offered by mobile technology helps to accommodate different ability levels and learning methods (Kebritchi, 2008). Students looking to support their learning at university prize tools such as emails, YouTube and podcasts (Gosper et al., 2011) – all of which are easily and readily accessible on even the most basic of today’s smartphones. This is confirmed by a recent Pew Research report which found that video-sharing site YouTube was a ‘very important’ source of knowledge when learning how to do new things for about half (53%) of users aged 18-29 and for 41% of users aged 65 and over (Smith et al., 2018).

The efficacy of integrating mobile technology with education has been backed up by research. A 2014 study concluded that the use of technology enhanced student engagement with the material, which in turn improved overall achievement (Fonseca et al.). This conclusion supports the earlier findings of Trimmel & Bachmann (2004), which suggested that students who included technology in their learning reported more interest in learning, higher participation rates in learning and a stronger motivation to do well than those who didn’t use such technology. Additionally, the same 2014 study found a significant correlation between technology use and academic achievement, confirming the same findings from earlier works (Gulek and Demirtas, 2005).

It would seem, then, that today’s smartphones and tablets are an effective foundation on which can be built a tool to support self-directed learning.

## Examining the market

The current market for self-education content is very active, with several important players. It can generally be categorised by the type of content that is provided, or how it is delivered. This section records my personal exploration of the current market and examines the similarities or differences posed by other operators’ offerings in this space. It should be noted that in almost all cases, the sites mentioned in this section have a corresponding native app for mobile use, but here they are treated as the same for the broader purpose of this examination.

Many sites, such as The Great Courses Plus, YouTube and Masterclass depend almost entirely on content delivery via video. As noted by Smith et al. (2018), video is a ‘very important’ source of learning for a significant demographic. Therefore, it would be prudent to include or at least consider a form of integration or other way to accommodate video-heavy learning content.

Other sites, such as Khan Academy, Udemy, and even official online university courses offer a more ‘traditional’ learning experience that relies mainly on the written word. Significant consideration must therefore be given to how these sources of content could be integrated or accommodated by a learning tool.

Further still, some apps try to … a more interactive approach to learning. Grasshopper, an app which teaches its user’s basic coding, it is possible to edit, compile and run simple code to perform an operation. This type of content delivery, although technically challenging to implement, could be an effective form of delivery as evidenced by Knowles’ fourth assumption of adult learners (Knowles, 1980).

Q FOR KOSTAS: Do I have to cite these apps/sites? If so, how do I do it?

## sum up knowledge in this chapter & explain how it can inform the research process

This chapter has explored the rise and growth of the self-directed learning movement, the research that has gone into this movement, and the technology that has allowed it grow even further in both its reach and efficacy. Based on the findings of this chapter, there is now a firm foundation on which I can begin to design my app.

Knowles’ theory of andragogy has provided a proto-customer to whom the software can be tailored. Furthermore, by satisfying the assumptions wherever possible, it should help improve user engagement with the software, and create value for the app by satisfying needs that are currently not met by other firms’ offerings.

Mobile technologies could provide an avenue to do this thanks to their versatility. It is evident that with the advancements in mobile technology, smartphones are now a common vehicle through which education can be delivered. The technology also provides the learner with an extra degree of control, which is imperative to increase student engagement, according to Knowles (Knowles, 1975).

To differentiate my software from that already on offer, and in order to avoid competing with vastly greater resources, I have decided that the software will be a type of utility tool, offering no content of its own, but instead providing a place to store, access, and review content that has been collected from other sources. By using the information learned in this review, I can begin to compose a more effective survey to elicit specific requirements for the software as I move into the design phase.

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