Survey Methods and Aging Research in an Arab Sociocultural Context—A Case Study from Beirut, Lebanon

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Objectives. In Arab countries, the proportion of older adults is rapidly increasing, highlighting the need to conduct research on factors that influence aging. We describe the context-specific challenges faced and the solutions negotiated during the conduct of a survey study on family relations and aging in Greater Beirut, Lebanon.

Method. Drawing on the experience of a recently completed survey study, we reflect on the context-specific challenges faced and the solutions negotiated during the phases of questionnaire construction, interviewer training, sampling, and participant recruitment as a means to contribute to the growing area of cross-cultural survey research.

Results. The social context of family relations influenced the nature of questions that can be included to obtain valid information. The unavailability of demographic data and the presence of cultural norms that promote deference to older adults also presented methodological challenges to the sampling and recruitment of older adults.

Discussion. We provided illustrative examples on the importance of learning about a country’s social and cultural contexts, and the necessity of exercising flexibility in decision making to ensure the collection of valid data and the successful completion of the study. Lessons learned inform elements of the research process in an Arab country, as well as bring to light unusual, yet generalizable, circumstances that will inform experiences in other cultural settings.

Key Words: Aging—Survey methods—Sociocultural context—Lebanon.

The process of conducting cross-cultural survey research merits systematic attention to guarantee the quality of results and to highlight elements of the research process in need of special planning. Although researchers in academic institutions are required to adhere to standard ethical principles and follow rigorous methodologies (Babbie, 2010), they may confront unexpected challenges when a study is set in a distinct social and cultural context. Reflecting on the research process and the methodological challenges encountered during various phases of a study may, therefore, be just as important as reporting the research findings. International researchers often learn that achieving the goals of a cross-cultural study requires flexibility in negotiating alternative strategies, creativity in employing the limited resources available, and an appreciation of the sociocultural context in which the study is set (Harkness et al., 2010).

Though the concept of culture has traditionally been the purview of anthropologists, its influence and meanings have been increasingly studied in virtually all social science disciplines. Culture as a category of social life can be conceptualized as narrowly as a construct that captures “learned behavior,” or as broadly and abstractly as a system devoted to the “production, circulation, and use of meanings” (Sewell, 1999, p. 41). As such, taking account of culture in research is important not only when conducting research in other countries, but also in studies taking place in rural and less developed regions or in distinct social classes in the same country (Hartley, 2004; Sewell, 1999). Acknowledging the importance of context in influencing the research process is especially critical in social science research that focuses on family and aging, as social values associated with the status of older adults in families may differ dramatically between cultures (Antonucci and Akiyama, 2004). Despite the cultural diversity, lessons learned from one context frequently uncover complex issues needing further investigation or bring to light unusual but generalizable circumstances that inform experiences in other cultural settings (Stake, 2000).

In this article, we draw lessons from our involvement in a survey study aimed at examining family relations and aging in Greater Beirut, Lebanon. Planning and data collection for the study were carried out during the summer and fall of 2009 and took place through collaboration between academic researchers in the United States and Lebanon, and a local research firm. We highlight the context-specific challenges faced and the solutions negotiated during the phases of questionnaire construction, interviewer training, sampling, recruitment of participants, and data collection. Social science writings have identified specific challenges in...
conducting research and interpreting data in cross-cultural settings (Altorki & El-Solh, 1988; Berry, Poortinga, & Panqey, 1997). Moreover, public health research in Lebanon has increasingly engaged process-related questions such as the barriers to obtaining informed consent from children or collecting valid data during times of war (Nakkash, Makhoul, & Afifi, 2009; Yamout & Jabbour, 2010). The current brief report is written in the spirit of expanding this body of contextual knowledge. It is specifically devised to inform researchers who have an interest in studying aging in Lebanon, the Arab region in general, or other settings (e.g., rural, less developed) in which the sociocultural context and data limitations may influence the course of a research study.

**Context of Aging in Lebanon**

Aging in Lebanon, and in the Arab region as a whole, follows a similar pattern to that taking place in the developing countries of Asia and Latin America. The Arab region has been experiencing what Palloni and colleagues called a “silent aging process” (Palloni, Peláez, & Wong, 2006: p. 149), which is an outcome of sudden and compressed declines in mortality taking place in a context of slow economic growth (Wong, Peláez, Palloni, & Markides, 2006). The age structure of the population in most Arab countries has been undergoing dramatic changes as a result of fertility declines and increases in life expectancy (ESCWA, 2010; Rashad & Khadr, 2002). Population aging is becoming a new concern in the region as a whole, and the proportion of older adults is increasing at a particularly rapid pace in low-fertility countries, such as Lebanon and Tunisia (Yount & Sibai, 2009).

In 2005, the proportion of persons aged 60 and older in Lebanon was the highest in the region (10%) and is projected to exceed 15% by the year 2025 (Sibai, Tohme, Yamout, Yount, & Kronfol, 2012). This dramatic demographic shift will inevitably pose medical, social, and financial challenges related to the care of the elder population, particularly in light of changing structural conditions that may impinge on cultural ideals. The Lebanese family has traditionally assumed the responsibility of providing social and financial resources to its older adult members and cultural ideals continue to support intergenerational co-residence. However, high rates of outmigration of young adults, as a result of continuing political turmoil and economic uncertainties, will certainly affect the quantity and quality of support aging parents can expect to receive from their children. Close to 50% of Lebanese families have at least one member who emigrated abroad between 1975 and 2000, and presently more than one third of Lebanese youth report that they would like to emigrate outside the country (Chaaban, 2009). Understanding the consequences of emigration for the well-being of older adults in any society requires attending to the context in which this population dynamic takes place. Such factors are of enormous concern to social scientists, especially those interested in better understanding the effect of family structure on society as a whole. Though emigration of children can exert negative consequences in terms of attenuating social support, research in a developing country has shown that it can also contribute positively to the financial well-being of aging parents (Knodel & Saengtienchai, 2007). In Lebanon, where public services for elders are insufficient and remain mostly provided by religious and nongovernmental organizations rather than by state institutions (Cammett, 2011), understanding the consequences of emigration and remittances becomes central to designing informed aging policies in Lebanon.

There are signs that high emigration already exerts an effect on the living arrangements of older Lebanese adults. Findings from recently published studies show that the proportion of older adults who live alone is 12% for both genders and 17.3% for women (Sibai, Baydoun, & Tohme, 2009; Tohme, Yount, Yassine, Shhideh, & Sibai, 2010). These proportions are higher than those reported in Africa (8%), Asia (7%), and Latin America (9%) (United Nations, 2005) and are at odds with cultural expectations. The changing demographic profile underscores the need to conduct high-quality survey research to examine factors that influence healthy aging in Lebanese society and the care older adults expect from their children and other family members.

**Study on Family Ties and Aging in Greater Beirut, Lebanon**

In contrast to research and policy on aging in Asian and Latin American countries, which began in the early 1980s with a number of large national and cross-national studies (Wong et al., 2006; Andrews & Hermalin, 2000), attention to aging in the Arab countries of the Middle East and North Africa has only recently gained momentum. In response to increased interest in studying social aspects of aging cross-culturally, and the need to further explore how demographic trends will affect care provision to older adults in Lebanon, we planned a study to investigate the following issues: intergenerational relations in Lebanese families, the perception of older adults as a burden versus a resource, and beliefs about socially and culturally acceptable care arrangements in old age.

To achieve these objectives, we began a program of research focused on the topic of social relations. It included multiple phases, beginning with an exploratory study in 2007 where focus group discussions were conducted in Beirut and the south of Lebanon to obtain a sense of how social relations are experienced. Cognitive interviews were also carried out to determine the feasibility of using the hierarchical mapping technique (Antonucci, 1986) to measure social relations in Lebanon. The exploratory phase was followed up with observational data during a 6-month stay in Lebanon during 2008 where family relations over the life course were the focus of study. Additionally, a pilot survey was conducted with 25 adults aged 60 and older during 2008. This survey...
included the social network measure tested in 2007 and was expanded to inquire about type and quality of relationships with family and friends, as well as multiple questions about health. Finally, in 2009, we designed a survey study with a structured questionnaire to be administered to 500 adults living in the Greater Beirut area. About half of Lebanon’s population lives in two governorates (Beirut and Mount Lebanon), which encompass the Greater Beirut Area (WHO UNDP, 2006). Because one of the overarching goals of the study was to generate policy-relevant knowledge based on the perceptions, experiences, and expectations of older adults in Lebanese families, the study design incorporated an oversampling of those aged 60 and older, with a gender distribution that reflects the proportion of men and women in Greater Beirut. Furthermore, the survey design ultimately provided future opportunities to compare and contrast social relations of Lebanese with other populations around the world where similar measures were collected (e.g., United States, Japan, France, Germany).

A contract was negotiated between academic researchers and an independent research firm located in Beirut. The team of three academic researchers represented the disciplines of psychology, sociology, and public health. Two of the investigators had extensive experience in aging research. The firm had ample experience working with social and political science researchers from universities in the Arab region and Lebanon. The relationship between the researchers and the firm followed a collaborative model and involved continuous and dynamic interaction at every phase of the decision-making process to ensure methodological rigor and data quality. Though survey research on older adults in many respects resembles that conducted with other age groups, scholars have highlighted special considerations that need to be taken into account, such as striking a balance between data quantity (length of the interview) and quality (validity) (Andrews & Hermalin, 2000). Moreover, finding the appropriate balance between standardization and accommodating to local issues in designing and implementing the study are vital to the survey research enterprise (see Pennell, Harkness, Levenstein, & Quaglia, 2010). In the remainder of this report, we highlight methodological issues we encountered related to successfully conducting the study on aging in Lebanon, particularly during the phases of questionnaire construction, interviewer training, sampling, participant recruitment, and data collection. Lessons learned provide new examples of how culture and survey methodology processes combine, drawing attention to advancing developments in understandings of how each area of study (culture and survey methodology) informs the other.

**Setting the Stage: Questionnaire Construction and Interviewer Training**

Given the attention provided in social science research to translating survey instruments and the key concepts they seek to measure (Harkness, Pennell, & Schoua-Glusberg, 2004; McKay et al., 1996), the researchers followed rigorous guidelines in the questionnaire construction and translation phases of the study. The survey instrument included questions on norms of family relations; social networks and social support; stress, health, and chronic disease; and sociodemographic information. After preparing a full draft of the survey instrument in English, two professional translators were hired to translate it to Arabic. The two Arabic versions were compared and merged into one, which was later back translated to English. The back translation was then compared with the original English instrument. This step was carried out to ensure linguistic equivalence, that is, that the meanings of certain important concepts related to social ties and familial exchanges had been captured in the Arabic version. As a result, the instrument continued to undergo modification through a process of negotiation between the academic researchers, who were invested in generating data on specific constructs related to family ties and aging, and the research firm, whose contact person was concerned with the feasibility of introducing certain types of questions in the Lebanese context.

To illustrate the instrumentality of these negotiations, we describe one situation that arose in relationship to measuring intergenerational financial transfers. The researchers, all having received their training in the United States, included a number of (what they perceived to be) straightforward questions on the amount and frequency of financial support participants provide to their aging parents. The representative from the firm felt that these questions would generate inaccurate data and might in fact offend some participants. She explained that because providing for aging parents is viewed as an obligation in Arab culture, the question may elicit invalid answers simply because participants may not be able to quantify the amount of financial support they actually provide. She further argued that some participants may feel insulted by an outsider asking them whether they financially support their parents, given that not doing so is culturally frowned upon. Such concerns may reflect similar challenges in other cultures where family reputation looms heavily in the decisions, attitudes, and behaviors expressed. For instance, Uskul, Oyserman, and Schwarz (2010) elaborate the significance of cultures (e.g., Latin American, Mediterranean, Middle Eastern), where family name and honor contribute enormously to social identities, and the resulting impact on the survey response process (Palmer, 1987). In particular, a concrete effort in such contexts is made to not only present oneself in a favorable light, but also close to others. The researchers discussed with the firm alternative wording that might be included to successfully capture the concept of interest. The final instrument included a subjective question to directly measure perceptions on the responsibility of family members versus the government in shouldering financial support to older adults who are in need. In addition, indirect questions were included, which would
enable researchers to capture the amount of remittances received among older adults who have emigrant children. In many cases, survey researchers have devised indirect measures when gathering data on sensitive issues (Tourangeau & Yan, 2007). Recognizing that indirect questions provide different information than direct questions, the researchers decided to include indirect questions concerning monetary intergenerational transfers out of respect for cultural norms, as well as to ensure that data collected would have more validity. This experience clearly highlights that researchers can hold erroneous views of what constitutes a sensitive research question in a certain context. As more cross-cultural research on aging takes place, thought needs to be directed toward constructing indigenous and valid measures that capture financial transfers from children to aging parents in various countries.

Interviewer training is another phase of the research process where close interactions between academic researchers and field workers helped facilitate communication and, in turn, enhanced the quality and validity of data. Initially, the firm had scheduled one half-day of training activities, which provided enough time for the researchers to meet the field workers, introduce the study, and review the questionnaire. The researchers requested another meeting to review the questionnaire section by section and to engage the field workers in mock interviews in order to detect any potential problems in administering the interview. The academic researchers also requested that a post pilot test meeting be scheduled in order to learn about the experiences and perspectives of field workers first hand. These steps were undertaken acknowledging that gathering even basic data about social issues through existing western questionnaires presents complex issues related to conceptualization and measurement (Andrews & Hermalin, 2000; Heeringa & O’muircheartaigh, 2010; Uskul, Oyserman, & Schwarz, 2010).

After pilot testing was completed, the report from field workers revealed a number of concerns related to obtaining valid data from older adults. First, field workers indicated that the instrument took much longer than expected with older adults (on average 1 hr 30 min). This raised concerns about the extent to which this age group was providing valid responses to questions placed in the second half of the survey instrument. Second, field workers reported that some questions, particularly those on social networks, made them feel uncomfortable because the questions required that names and personal information about family members of the interviewee be provided. Third, even though researchers conducted mock interviews with each field worker as part of the training, it was while pilot testing the questionnaire that challenges of gathering self-reported health data through face-to-face interviews with older adults surfaced. Researchers discovered that field workers needed more training on how to record answers to self-rated health questions.

To address these concerns, the researchers removed a number of questions (based on low variability identified through previous data collections using the same questions), thus reducing the interview length to approximately 1 hr. This amendment had special relevance for older participants to ensure that they were not burdened by the interview. It was also decided to use response cards to which participants could refer during the interview process. For older adults, this would reduce reliance on memory and enhance the validity of data. Moreover, the procedure to gather social network data was shortened and amended to minimize the perception of intrusiveness.

To ease concerns about anonymity and confidentiality while asking for names of social network members, a new strategy was developed to collect first and last name initials of network members as opposed to full names. For older adults, this also helped protect them from divulging preferences of network members in any readily discernible manner. Finally, the concern raised about gathering self-reported health data provided researchers with an opportunity to restate one of the main principles of survey research, namely, that the interviewer should record an interviewee’s response as provided. We reiterated that the interviewer is not at liberty to judge whether a participant’s response is correct or legitimate. Specifically, the researchers emphasized that the self-rated health question is intended to be subjective and that, especially among older adults, self-rated health is determined by a complex interplay of psychosocial factors in addition to the presence of chronic conditions. Field workers were requested to record a participant’s subjective health assessment as given by the interviewee even if it did not seem consistent with their own judgment of the respondent’s health. This point is particularly key for studies on aging where subjective ratings reveal key insights about quality of life in old age above and beyond objective health indicators (Jylhä, 2009).

Recruitment of Participants
Following the training and addressing concerns that arose during pilot testing, researchers accompanied interviewers in the field to observe how recruitment and data collection ensued. They noted issues unique to the Lebanese context whereby the experience of field workers as well as the manner in which the firm organized field work facilitated the research process. Because most residential neighborhoods in Greater Beirut are segregated by religious sect, the firm adopted a strategy of matching interviewers and potential participants based on religious composition of the neighborhood in which a selected household is located. In Lebanon, religious sect matching of interviewer with neighborhood served highly vital, much as same race matching is important in contexts where race differences are salient (Hill, 2002; Jackson et al., 2004). It became clear to researchers during the field visit that this strategy served an instrumental purpose; it facilitated entry of field workers into a household and helped establish rapport based on a perceived shared identity between interviewer and interviewee. The Lebanon
case draws attention to specific demographic characteristics in need of attention, highlighting a context-specific critical attribute for matching interview characteristics (see Pennell et al., 2010 for consideration of field staff issues in various cultural contexts). Once the interviewer gained entry into a household, however, the process of random selection and recruitment required a different level of negotiation around social expectations. For instance, interviewers could not begin the interview right away but were required to take time to develop a rapport or “warm up” the potential participant by asking questions about his or her well-being, exchanging comments about the weather, and accepting a cup of coffee. These social expectations have long been identified by others as crucial to carrying out research in the Arab world (Farah, 1987). Moreover, in many cases, where the first contact took place with one household member but another member was selected for participation in the study, the interviewer had to convincingly explain the merit of random selection without jeopardizing the rapport that had already been established. This was even more difficult if arrangements had to be made to return to the household if the randomly selected person was unavailable. Such a request seemed strange to household members who were present because they were available and willing to be interviewed. Successfully negotiating this situation required a high level of social competence. Interviewers needed to communicate basic principles of probability sampling and gain cooperation in scheduling a return visit to interview another household member. At the same time, they needed to take care not to imply that opinions of other family members were less valuable.

The above experiences highlight that it is critical for researchers to become involved during the interviewer training phase of the research and to do so with the cooperation of the research firm (Pennell et al., 2010). In this case, whereas the firm conducted basic training, the researchers took responsibility for study-specific training, following up on pilot testing and monitoring data collection quality at the initial stages. Researcher involvement in field worker training ensured collection of the highest quality data possible. At the same time, the researchers relied on the expertise of the firm and field workers to facilitate data collection while taking care to respect cultural norms related to the status of older adults in Lebanese society. Researchers learned that, in the context of Lebanon, identity matching based on religious affiliation is an important avenue for collecting data. This had special relevance for older adults who had lived through a civil war that lasted for 16 years, in which a major component involved sectarian conflict. Researchers also discovered the importance of continuous negotiations with household members, who did not necessarily see the merit of probability sampling, but believed that, because the study is on the well-being of older adults, the best person to interview was the oldest adult member of the family. This became an issue that influenced the attainment of a probability sample and the recruitment of participants.

Sampling, Oversampling, and Data Collection
In survey research, generating a sampling frame and selecting participants are two of the most important steps in the research process. Establishing the sampling frame, which entails identifying all cases that should have an equal probability of selection, is not always possible or practical in social science surveys (Heeringa & O’Muircheartaigh, 2010; Singleton & Straits, 1999). This is the case even in countries that have a tradition of collecting census data or large-scale survey studies. In Lebanon, social scientists who wish to employ probability sampling in research face numerous challenges. First and foremost, census data in Lebanon have not been collected since the 1930s, when its population of less than 1 million was living under French rule (Salibi, 1988). Since the country gained independence in 1943, continuing political and sectarian conflicts have stymied population-level data collection efforts (Traboulsi, 2007). As such, accurate information on the age distribution and other sociodemographic characteristics of the Lebanese population are lacking. Obtaining an accurate demographic profile is further hindered by a political system based on a “delicate sectarian balance,” whereby data on religion and other social indicators are highly contentious (El Khoury & Panizza, 2005).

Taking these realities into account, one of the first issues the researchers discussed with the firm revolved around securing a probability sample for the study that accurately represents the age distribution, socioeconomic, and religious make-up in Greater Beirut, and the collection of valid data. Early on, the researchers requested that data collection take place through household visits and face-to-face interviews. Given the weak telecommunication infrastructure in Lebanon and the overreliance on mobile phones in a context where many households do not have landlines, data collection through telephone interviews was not an option. Furthermore, due to concerns about the completeness and validity of data, particularly since the researchers intended to oversample older adults, the researchers decided against self-administered questionnaires.

The interactions between the firm and the researchers proceeded with the researchers clarifying their expectations with respect to sampling. Given that the firm had previously carried out studies that relied on random but nonprobability sampling (i.e., quota sampling), the researchers quickly realized that they needed to clarify the definition of probability sampling. After reaching a common understanding about what probability sampling entails, the firm presented the researchers with two strategies by which to attain the sampling specifications. The first strategy proposed would have used voter registration records as a sampling frame to select a stratified sample that represents all directorates within Greater Beirut. Knowing that voter registration in Lebanon is based on place of birth, not place of current residence, the researchers did not feel this strategy was acceptable. Alternatively, the firm suggested selecting a
random sample of geographic clusters from each directorate in Greater Beirut, followed by a random selection of households within each cluster. This design was mutually agreed upon, given that it would allow for a sample representative of the age, socioeconomic, and religious diversity of the population, hence representing a “collaborative sample design effort” (Heeringa & O’muircheartaigh, 2010, p. 251). Furthermore, because one of the main study objectives involved attending to the experiences of older adults, the researchers aimed to oversample persons aged 60 years or older to constitute 30% of the final sample. In order to decide on sampling specifications, the researchers and firm examined available demographic data but found that distinct data sources provided different age distributions. The researchers resolved to rely on the age distribution provided in the 2007 national household survey, which reported the proportion of persons aged 60 and older at 13.3% (Lebanese Ministry of Social Affairs, 2008). They discussed with the firm how to oversample so as to attain the desired proportion of 30% older adults. Adhering to oversampling protocols adopted in aging studies in Latin America (Wong et al., 2006), it was decided to do the following: (a) if the household member selected through a random method is aged 60 or older, that person would be included in the study and (b) if the household member selected through the random method is younger than 60 but there is another older adult member residing in the same household, both individuals would be included in the study. Finally, to achieve a response rate of 70%, the researchers requested that each household be re-contacted at least 3 times on different days of the week and at different times of the day.

At the end of the data collection, the researchers were pleased to learn that the sampling specifications were reached and that the sample included the desired proportion of older adults. However, when the raw data and descriptive analysis were received, the researchers observed discrepancies in response rates between regions. They also discovered that the oversampling strategy was followed in only a small proportion of selected households and that the proportion of 30% older adults could not have been attained by mere chance. The researchers requested a meeting with the firm during which they learned that field workers encountered challenges in certain neighborhoods throughout Greater Beirut. In some neighborhoods, governed and served primarily by one political party, permission was needed to enter and conduct the study, an experience similar to that reported by other researchers in Lebanon (Makhoul, Abi Ghanem, & Ghanem, 2003). Difficulty entering an area to collect data is not a unique challenge (Pennell et al., 2010; Varughese, 2007), having been documented in various cultural locales. Yet, such challenges have special implications for better understanding aging and well-being in the Lebanese case. In Lebanon, welfare and social services are often provided by religious groups and political parties (Cammett, 2011). Because the area where interviewers were less successful obtaining interviews were those controlled by religious groups and political parties who tended to provide services, it may be that older adults from the excluded neighborhoods access more formal services than older adults in neighborhoods more successfully surveyed. Unfortunately, it is impossible to ascertain how this situation might have influenced our findings concerning intergenerational relations and care expectations in old age.

Moreover, the researchers discovered during the meeting that the firm adopted an alternative oversampling strategy but did not communicate this to the researchers assuming that the outcome (attaining the 30% proportion of older adults) was the goal and that the process by which it was achieved held less importance. Interestingly, adopting the alternative strategy made reaching sampling specifications feasible because it worked synergistically with cultural norms related to aging. In Lebanese culture, family members often defer to their elders on matters where they perceive an authoritative voice is needed (Joseph, 1993). In the specific case of our study, field workers encountered situations whereby the household member selected through the random method often deferred to an elderly household member, indicating it more appropriate to solicit the elder’s views on the topic of family ties and aging. Whereas the end result achieved the age proportional goals of the researchers, the nonsystematic nature through which oversampling of older adults was achieved place introduced an added level of complexity, which will require a more involved weighting of the data as analysis begins.

**Conclusion**

Aging has become a global challenge. Designing policies to address the medical and social needs of older adults is a pressing issue for high- as well as low- and middle-income countries. Research on family relations and the well-being of older adults in Lebanon promises to inform theoretical and practical knowledge on aging in the Arab region and in other middle-income countries experiencing similar demographic changes. This brief report provides insights concerning the challenges faced in our study on family ties and aging in Lebanon and the successful solutions negotiated. Though the issues faced reflect basic survey research challenges (Babbie, 2010; Harkness et al., 2010), they do communicate the nature of survey research in Lebanon, providing insights for future research in the region but also illustrating how and where challenges mirror those experienced in other national or cultural contexts. This brief report contributes to the growing interest and concern with conducting research in diverse cultural contexts. Of key interest are a country’s social realities and cultural norms, both of which provide a critical backdrop to potential challenges that may arise during the survey research process. For example, it is important to recognize
that the politics of data in a sectarian system shape the data resources available and the strategies researchers need to follow in order to sample older adults. Moreover, cultural norms that promote deference to older adults on certain issues may facilitate data collection but introduce methodological bias. For example, in studying family ties and aging in Lebanon, randomly selecting a household member may be at odds with the perceptions of family members themselves about the best person to participate in the study. Despite the challenges encountered, the rewards of cross-national collaborations in aging research provide critical contributions to the developing canon on social aspects of aging globally. Effective and meaningful research in this area is best achieved when researchers are open and flexible and when a mutual commitment to both the process and outcome of research characterizes the research collaboration. This involves willingness to openly state issues in explicit terms, without assuming that ideas and expectations are understood a priori. It also requires reflexivity where both international researchers and a local research firm think together critically about all aspects of a research study to ensure its successful completion.

The lesson learned here is that attention to the political and cultural contexts is highly important in some societies and requires researchers to maintain open communication with data collection firms throughout the entire research process, not just during the preparation phase of a survey study. In this case, challenges encountered involved the politics of obtaining demographic information in a country where religious sectarianism has impeded the collection of population-based data for decades. This limitation made it difficult to ascertain the age distribution of the population and, in turn, influenced the researchers’ approach to oversampling older adults. Cultural norms further complicated the process of oversampling. The firm felt it was their duty to attain the oversampling specifications without troubling researchers with details; they assumed that adopting an alternative strategy did not constitute a breach in methodology and thus did not perceive the need to communicate such a modification to researchers. On their part, researchers believed they were being kept abreast of any changes in methodology, even those that facilitated the research process. In sum, ongoing and open communication between researchers and the data collection firm is crucial, helping to address challenges that emerge over the course of aging research.

In sum, we believe this detailed account of collaboration between academic researchers, and a research firm provides key insights into the importance of a strong collaborative relationship among partners. This can only be developed through open communication, country-specific background research, and attention to cultural norms. Such collaboration significantly improves the probability of acquiring high-quality credible data and is critical when conducting aging research cross-culturally.

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