

Concepts of researching the loneliness of elderly

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For citation: Alexandrova, N. H. (2019) Concepts of researching the loneliness of elderly. *Psychology in Education*, vol. 1, no. 2, pp. 176–183. DOI: 10.33910/2686-9527-2019-1-2-176-183

Received 17 June 2019; reviewed 20 June 2019; accepted 26 June 2019.

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Abstract. The strong research interest in the psychology of aging results from the increasing share of the elderly in the social and demographic structure of the modern society. Both loneliness and social isolation are generally seen as problems related to ageing and are considered particularly important determinants of seniors' well-being. Social isolation is an objective indicator of poor social integration. In other words, loneliness may be described as a type of social isolation that is perceived negatively. There is a difference, however, between a state of loneliness (referring to a short-lasting sudden feeling of loneliness) and loneliness as a trait, i. e. a relatively long-lasting experience of loneliness. The level of and the reasons for loneliness, as it is perceived by the elderly and as it drives their behaviour, depend on their age bracket. Loneliness in the old age is associated with reduction in activity connected with inability to work or a lack of mobility, rather than a lack of social contacts. The problem of ageism pertains to a discriminatory attitude towards elderly individuals and their isolation from society. This is an important social and psychological factor that enables the feeling of loneliness. Obviously people in the later periods of ontogenesis have not only to adapt to the new external conditions, but also to react to the changes within themselves. The present paper attempts to define personal subjectness (i. e. agency) as a quality of the senior individual's personality, which includes their ability to adapt not only to constantly changing environment, but also to one's own self. The content of the personal subjectness is also presented through the characteristics of the lowered or increased levels and different types of loneliness.

Keywords: loneliness, psychological approaches to studying and research, isolation, seclusion, methods of research, subjectness.

Introduction

Challenges we face in our lives pose new problems for both psychological research and applied psychology. In this sense, the essential task of psychology consists in investigating problems and issues related to the increasingly clearly outlined practical challenges.

The statistical data show that the number of people of young-old and old-old age is on the rise. In the American society, for instance, this age group will have doubled by the end of the 21st century. Moreover, the mortality rate among people over 65 years of age, especially among women, will decrease considerably. According to UN projections, in 2050 there will be over 300 million people at the age of 60 and older in Europe. Today 22.5% of Bulgaria's population is represented by people of retirement age.

Loneliness is perceived as a strictly subjective, individual and often unique experience. It can only be investigated and interpreted within the framework of its multiple aspects. According to researchers studying this phenomenon in all age groups, loneliness is a potential source of stress and the cause of numerous personal and individual challenges. This publication aims to present the problems of loneliness from the point of view of psychological studies and explore the possibilities for studying it at later stages of human ontogenetic development. The increase in life expectancy is one of the key processes in worldwide demographic development during the 20th century and today. Clerk and Anderson (1985) established that the interest in inner personal changes among the elderly had increased, accompanied by a gradual rise in high sensitivity towards privacy (Anderson, Arnolt 1985).

It is precisely the 1970s that are seen as the start of the era of studying loneliness. It is no accident that psychologists have dubbed the phenomenon of loneliness the plague of the 21st century. The first attempts at an ontological study of human loneliness emerged in existentialism during the 20th century. That interpretation within the framework of the ontological investigation of loneliness became possible thanks to the emergence of E. Husserl's phenomenology (Craig 2003).

Research approach

D. Perlman and L. Peplau classified the attempts at studying loneliness, dividing them into eight groups: psychodynamic, phenomenological, existential-humanistic, sociological, interactionist, cognitive, intimate and theoretical and systemic ones (Peplau, Perlman 1998).

The *behaviourist approach* explains loneliness as a response to a lack, an absence of social protection and support, cognitive theories underscore the perception of disparity between the social contacts that are sought for and achieved, and the psychodynamic theory addresses (Weiss 1973) and is focused on unsatisfied needs (Bar-Tur, Prager 1996).

The *social psychology* of loneliness includes K. Bowman, J. Reisman and F. Slater among others (Fromm-Reichman 1959).

K. Bowman sets forth the hypothesis of the three social forces leading to increased loneliness in the modern society: (1) reduced contact with the primary group; (2) increased family mobility; (3) increased social mobility. Individuals oriented towards the others not only wish to be liked, but have to continuously adapt to the circumstances and control their interpersonal environment, to determine and structure their course of behaviour. "People who are outward-oriented" are detached from their genuine *Self*, their feelings and expectations. According to J. Reisman, the members of the so called *outward-oriented* society constitute the "lonely crowd" (Fromm-Reichman 1959).

From the point of view of Neo-Freudianism, the state of loneliness is determined by the external conditions that drive pathological and extreme traits of an individual's character or impede the fulfilment of their needs. In concord with Sullivan and Zilburg, Frieda Fromm-Reichmann traces the roots of loneliness to personal experience gained in childhood, dubbing it *disintegrating loneliness*. Researchers leaning towards the psychodynamic approach are willing to regard loneliness as the result of early childhood impact on personal development. The representatives of this approach focus their attention on inner personal factors and inner psychological

conflicts causing the state of loneliness (Fromm-Reichman 1959; Aleksandrova 2006).

James Howard's studies are of particular importance for research in the sphere of loneliness. He believes that human self-awareness is essential for understanding human loneliness. Awareness has a dual power. It can be outward-oriented and *extrareflexive* or inward-oriented and *intrareflexive*. The latter may make an individual vulnerable to the feeling of loneliness. Similarly to J. Howard, E. Fromm studied the causes of loneliness and established the fact that it is subjective self-awareness that led an individual to become aware of oneself as an individual entity different from other people (Fromm 1990). E. Fromm pointed out that existential isolation was a cause of serious anxiety. J. Koen who continued the course of research of A. Maslow looked at loneliness from the point of view of humanistic psychology. According to him, loneliness is nothing but a derivative of a series of unsatisfactory relations of a subject with other subjects that are of importance for him/her (Fromm 1992).

Within the *phenomenological theory*, it is C. Rogers that addressed the subject of loneliness. His analysis is based on the theory of the *Self*, where it is believed that society forces the individual to act in compliance with the socially underprivileged restricting the freedom of action. This results in a contradiction between the inner genuine *Self* of the individual and the manifestation of the *Self* in the individual's relations with other people. He underscored the feeling of emptiness and loneliness in life when the *genuine Self* was not manifested and one lived according to his/her social image displaying solely one's *façade* (Rogers 1977). He saw loneliness as alienation from oneself. The individual feels lonely when, having removed the protective barriers on the way to the *Self*, he/she thinks that contacts with others will be denied to him/her. According to C. Rogers, the individual's genuine *Self* is rejected by others and that makes people secluded in their loneliness. The fear of being rejected results in one's sticking to one's social roles or *façades*, and hence the feeling of emptiness persists. Therefore, Rogers and Whitehorn are unanimous in their belief that loneliness is caused by the individually accepted discord between the genuine *Self* and the way the others see the *Self*. According to C. Rogers, loneliness is an evidence of the poor adaptability of the personality caused by the phenomenological incompatibility of the individual's perceptions of the "Self". In a nutshell, loneliness is an evidence of the disparity between the actual and idealized *Self*. C. Rogers sees loneliness as an alienation of the personality from its genuine inner feelings (Rogers 1977; Aleksandrova 2006; 2015).

Loneliness in existential psychology. According to this theory, loneliness is innate and is regarded as a necessary aspect of life, whereby even in one's inmost moments in life one is essentially *alone*. According to this approach, loneliness is a system of protective mechanisms which protect one from dealing with major issues of life and constantly force one to seek joint activity with others (Moustakas 1972). K. Moustakas himself singles out two types of loneliness. He calls one of them *conceited loneliness* and the other *genuine loneliness* (in this respect his views are close to those of some Eastern religions). He defines conceited loneliness as a set of defence mechanisms that prevent the individual from making a decision on substantial life issues by carrying out "activity for the sake of activity" jointly with other people. Genuine loneliness stems from the awareness of "the actual lonely existence." The main problem with this theory is its failure to distinguish between the objective character of being alone and the subjective feeling of being alone (Victor, Scambler, Bowling, Bondt 2005; Victor, Scambler, Bond, Bowling 2000).

According to I. Yalom, there are three types of loneliness (isolation):

- 1) From one's own self (inner personal). One flees from some of one's own grievous and difficult experiences by raising barriers between different aspects of the Self. It does not only happen when one wants to protect oneself from unpleasant feelings or thoughts, but also when one does not trust oneself.
- 2) From others (interpersonal). The individual avoids relationships with other people and the assumptions that he/she does not live the way he/she would like to. There may be several reasons for that: a lack of skills for creating close relationships, fear, individual traits, previous experience in relationships, etc.
- 3) From life (existential). One hides within the crowd, immersed in sadness and grief and in the assumption that there is no sense in living. One may have wonderful relationships with the members of their family, with oneself. But he/she draws the conclusion that it is only he/she that bears responsibility for life and that no relationship may reach thorough understanding and permanent love. The reason for this is that nothing can invalidate the fact of life, namely our existential loneliness. This mode of thinking is not only characteristic of young-old and old-old people (Yalom 1999).

The existential approach is centred around the *fact* that people are lonely in principle and thereby no one can share someone else's feelings and thoughts; disunity is the essential state of one's experience.

The *cognitive theory* is focused on the response and experience of loneliness, while also acknowledging the contribution of social factors (Young; Peplau, Perlman 1998). This theory stipulates that the way people feel in their loneliness is the determining factor of their experience of loneliness. It is evident that loneliness can be alleviated by self-assessment, support and social skills. However, this theory fails to acknowledge and assess the strong bond between social networks and loneliness and to integrate old people with cognitive disorders (Victor, Scambler, Bowling, Bondt 2005). Researchers who accept the cognitive approach usually include the following characteristics in their models: (a) descriptive characteristics of social network (intimate relations as well as a wider group of acquaintances, colleagues, neighbours and relatives); (b) criteria or standards of relations; (c) personal traits (e. g. social skills, self-respect, shyness, anxiety, introversion); (d) general characteristics (e. g. gender and health).

The interactionist theory is based on Bowlby's theory of attachment (Weiss 1989), accepted by Weiss and related to the emotional and social character of loneliness (Savikko 2008). R. Weiss is also a major exponent of the interactionist approach in studying loneliness. He differentiates between two types of loneliness which have different prerequisites and different affective reactions (Weiss 1973). Social loneliness is related to a lack of social integration and to a lack of integration within a community. Social loneliness emerges when the individual's participation in social activities, volunteering and church activities decreases and his/her social contacts with colleagues, neighbours and friends are limited (Kharash 2000). In general, this theory suggests that loneliness is caused by a combination of a lack of an attachment figure and a suitable social network. According to this point of view, the driving factors of loneliness include the interaction between individual's personal traits and their sociocultural contexts. According to researchers, the situation of loneliness only emerges when there are contradictions between the personal and social pillars of identity.

Essence of the concept of loneliness. The definition of loneliness is different in different theories. There are two major trends in studying loneliness that have emerged in modern research; we can sum up their attitudes towards it:

The first one: the perception of loneliness as a psychological condition or a subjective experience within the context of self-awareness and identity;

The second one: the perception of loneliness as a predominantly negative state and experience.

Loneliness is perceived as a multidimensional phenomenon (De Jong Gierveld 1998) and as a universal experience (Hell 1999). Loneliness can be defined as a subjectively experienced emotional state that causes avoidance and is related to the perception of unfulfilled personal and social needs (Peplau, Perlman 1998). Some authors believe that loneliness can be conceptualized as a one-dimensional unit and accept that the experience of loneliness is the same for all circumstances and causes (Russell, Peplau, Cutrona 1980). The feeling of loneliness as a personality trait is defined as a constant state of depression connected with the feeling of uselessness, isolation, spiritual emptiness caused by the lack — real or imaginary — of required interpersonal relations.

Derlega and Margulis define three stages in the development of the concept of loneliness (Derlega, Margulis 1982). The first stage underscores the importance of the concept. The second stage studies the concept and attempt to study the similarities and differences between this concept and other phenomena. The theory of loneliness emerges at the third stage.

Loneliness could also be regarded as a complex phenomenon which may be defined from the point of view of the *bio-psycho-social* model. Some people may be biologically predisposed to feel lonely, which is probably related to inherited personal traits, while others may experience loneliness related to other causes of psychological nature, such as grief or depression. From the social point of view, an individual may experience loneliness as a result of social isolation. The advantage of explaining loneliness in this way is that the factors causing the experience of loneliness are clearly defined, which helps to choose optimal therapeutic interventions.

It is important to differentiate between loneliness, solitude, isolation and a lack of social support. One of the representatives of psychoanalysis is Zilboorg (Zilboorg 1938). He published the first psychological analysis of loneliness distinguishing between loneliness and seclusion. Being alone or in the state of *solitude* is not always regarded negatively by the individual. What is more, it is possible for one to feel lonely while being in the company of other people. While loneliness is an unwanted experience by definition, seclusion or solitude can be desirable, as it encourages creativity, facilitates self-reflection, self-regulation, concentration and learning.

Loneliness and social isolation are often regarded as problems related to ageing and are considered particularly important determinants for elderly well-being (Sinclair, Parker, Leat, Williams 1990). Social isolation is an objective indicator

of poor social integration. In other words, loneliness may be described as a type of social isolation that is perceived negatively (De Jong Gierveld, Kamphuis 1983). There is a difference between the state of loneliness (referring to a short-lasting sudden feeling of loneliness) and loneliness as a trait, i. e. a relatively long-lasting experience of loneliness. E. Fromm has made a substantial contribution to defining the reasons for loneliness. He develops and supports the idea that the reason for loneliness is one's dissatisfaction with unfulfilled social and spiritual needs (the need for respect, recognition and high self-esteem, self-expression and self-fulfilment). The research mentioned above demonstrates that there are many definitions of the feeling of loneliness that partially contradict each other.

Trends in studying loneliness in the elderly.

The studies of Perl et al. into the factors of loneliness in young-old and old-old people demonstrate that social contacts with friends and neighbours have a more favourable effect than contacts with relatives. Contacts with friends and neighbours diminish their feeling of loneliness and boost the feeling of aptitude and of being respected by others.

The level of and reasons for loneliness, as it is perceived by the elderly and as it drives their behaviour, depend on their age bracket. People who are eighty years old and older understand the meaning of *loneliness* in a different way compared to people who belong to other age brackets. Loneliness in the old age is associated with reduction in activity connected with the lack of ability to work or a lack of mobility, rather than a lack of social contacts. The problem of ageism pertains to a discriminatory attitude towards elderly individuals and their isolation from society. This is an important social and psychological factor that enables the feeling of loneliness. Therefore, the perception of elderly individuals as selfish and egocentric arises from this kind of derogatory attitude to them. The individual uses a defence mechanism to react to this kind of attitude, developing various behaviours which can be associated with the experience of loneliness. The feeling of a lack of communication may trigger the experience of loneliness and diminish the feeling of self-esteem.

Modern studies by K. K. Bowman, R. S. Weiss, L. P. Greiman, P. A. Peplau, D. Perlman, J. Puzanova, D. Russell, W. Sadler among others focus on the problem of loneliness. Researchers dealing with the subject of loneliness of the young-old and old-old are V. Alperovich, F. Hopflinger, etc. (Rubinstain, Shaver 1989; Peplau 1989; Perlman 1989).

Loneliness and low self-esteem are closely related. According to Shaver and Rubinstein, a lack or a loss of attachment in early years results

in the feeling of loneliness and low self-esteem. Such personality traits as low self-confidence and shyness can not only make people prone to loneliness, but can also impede the recovery from the state of loneliness (Peplau, Perlman 1998).

The tools for assessing loneliness may vary from one question to detailed self-assessment instruments. The simplest way of assessing loneliness is by asking one question, i. e. “Do you feel lonely?” so as to see how the individual assesses their state of loneliness by giving an answer ranging from “never” to “often/always.” The advantages of such self-assessment include ease of use in clinical and research conditions, acceptance by people and the directness of the question on one’s feeling of loneliness. However, a self-assessment tool with only a single item is not able to differentiate between emotional and social loneliness or identify situational and personal aspects of experience.

Empirical studies of loneliness often interpret it as a painful pathological condition, studying it within a specific age bracket with a focus on the onset and experience of loneliness at various stages of life or for different socio-demographic groups (people living alone, single, etc.). However, the only feature of loneliness that all the available methods allow to measure is “the level of experiencing” loneliness: high, average or low. We believe that the transition to the empirical level of studying the phenomenon of loneliness would require researchers to take several major problems into account (Sadler, Johnson 1989; Miller 2011):

1. There are many definitions of *loneliness*; since the inner *content* of loneliness is specific for each and every individual (it may be also associated with *solitude, isolation, alienation*, etc.).

2. Individual reactions to loneliness, the emotional attitude to the phenomenon and experience of loneliness vary greatly.

3. A variety of causes have an impact on the emergence of loneliness. That said, theoretical models based on psychology and taking into account both psychological and social factors are quite sufficient.

Literature mentions the so called social assessment of loneliness, taking into account the experience of loneliness in specific social groups. There is also the so called cultural dimension of loneliness; a perfect example of an artistic investigation of this dimension is “Steppenwolf” by Hermann Hesse. This novel looks into the dilemma that arises from the differences between two cultures — the old and the new. Cultural loneliness is above all manifested in societies and small groups experiencing turbulent social changes.

Methods of Research

There are various self-assessment tools for assessing loneliness. The table below is an attempt at systematizing the techniques used for studying loneliness by a number of researchers; it sums up some of the main scales applied in research.

UCLA Loneliness Scale (Russel, Peplau, Cutrona 1980; Russell 1996) is the most frequently used self-assessment tool for general loneliness, preferred by both researchers and practitioners. It was developed for assessing the satisfaction with one’s social relations. It was designed as a one-dimensional tool; its items investigate both the frequency and the intensity of the particular aspects and states of experiencing loneliness (e. g. “How often do you feel lonely?”). It assesses loneliness as a uniform phenomenon which is one and the same irrespective of its cause. In order to reduce the biased response, the word “lonely” is never mentioned in the questionnaire. It must also be pointed out that the scale does not specify a time framework and it is unclear whether it has been designed as an assessment of loneliness as a temporary state or a character trait.

Unlike the UCLA Loneliness Scale most of the other scales (De Jong-Gierveld Scale, Wittenberg Emotional vs Social Loneliness Scale, Russell Emotional and Social Loneliness Scale and Social and Emotional Loneliness Scale for Adults) can assess both social and emotional loneliness (De Jong-Grinveld, Kamphuis 1983). According to de Jong-Gierveld scale there are three dimensions of loneliness: intensity, time frame and emotional features. It is noteworthy that Wittenberg Emotional vs Social Loneliness Scale and Social and Emotional Loneliness Scale for Adults correlate moderately with the UCLA scale and correlate in a specific way with the subscales assessing social loneliness (DiTommaso, Spinner 1997).

The full version of SELSA — Social and Emotional Loneliness Scale for Adults — is a 37-item multidimensional measure of loneliness assessing emotional (romantic and family) and social loneliness. It uses the 7-point scale of the Likert type whereby each item is assessed from 1 (totally disagree) to 7 (completely agree).

The Differential Loneliness Scale — DLS focuses on particular spheres and dimensions of relations in which loneliness may be experienced and assesses the degree to which the individual is satisfied or dissatisfied with each of the four particular types of social relations: romantic/sexual, friendship, family relations and relations with bigger groups or with the community. Higher results in each scale

Table 1. Methods of assessing loneliness

Name of the scale	Author(s) and year of creation	A short description	Psychometric features
De Jong-Gierveld Scale	De Jong-Gierveld (1987)	11-item scale — six items assess emotional loneliness whereas the other five assess social loneliness	α coefficients between 0.7 и 0.76 for a six-item scale. Correlation between the six-item scale and the 11-item scale is very high — between 0.93 и 0.95
Loneliness Scale UCLA	Russell (1996)	Twenty-item scale with each item ranging from 1 (never) to 4 (often)	High inner consistency $\alpha = 0.92$. Good test reliability ($r = 0.73$ after 12 months)
Social and Emotional Loneliness Scale for Adults (SELSA)	DiTommaso and Spinner (1993, 1997)	Thirty-seven item Likert scale. Divided into subscales assessing romantic, family and social loneliness.	Inner consistency of 0.89. Moderate intercorrelations among subscales.
Loneliness Rating Scale	Scalise et al. (1984)	Likert scale with forty adjectives assessing four ten-item dimensions — agitation, weakness, exhaustion and isolation.	High inner consistency for the four subscales ($0.82 < \alpha < 0.89$)
Wittenberg Emotional vs Social Loneliness Scale	Wittenberg (1986)	Five-item Likert scale for assessment of social and emotional loneliness	Good inner consistency for the two subscales ($\alpha = 0.78$ и 0.76 respectively). The two scales correlate moderately ($r = 0.44$).
Russell Emotional and Social Loneliness Scale	Russell et al. (1984)	Individual items with each of them including a description of two sentences of the type of loneliness (emotional or social loneliness), followed by a nine-point scale.	There are no reported data about inner consistency due to the items' unique features. The authors report an insignificant correlation between the items' results.
Differential Loneliness Scale	Schmidt and Sermat (1983)	Sixty-item true-false scale divided into four subscales: romantic, friends, family and loneliness within a big group.	High inner consistency (continuity; persistency, coherence) $\alpha > 0.89$ with an assessment of subscale (subscales) over 0.70

are indicative of higher levels of dissatisfaction (DiTommaso, Brannen 2004).

We definitely believe that a holistic, comprehensive approach is required to study loneliness, allowing individuals to attain a harmonious state. The feeling of loneliness results in a loss of harmony in any person, particularly in the period of ageing. This process is exacerbated by the change in individual's social and psychological environment within a framework of a wider circle of events that make it difficult for an individual to function as a holistic whole. The emergence of loneliness may be driven by a number of psychological factors such as low self-esteem or the level of loneliness in the context of the subjectness. These factors, in turn, are a reflection of a pre-existing problem, harsh living conditions and deteriorated relations with the environment and personal surroundings (Lebedev 2002; Volkova 1997; Slobodchikov 2000; 2013).

Subjectness is an individual psychological trait that facilitates the effective adaptation of young-old and old-old people to their new living conditions, which includes loneliness, as well as to their own

selves in the objective context of their involuntal changes. The nature of subjectness in the elderly is clearly defined as a condition for personal and psychological adaptation of people of that age to the environment and to their own selves (Alexandrova 2013).

Since subjectness is a core systematic process, it also determines the specific traits of the old individual's personality. Subjectness is unique because of its integrative nature, as well as the complexity of its qualities based on the internal conditions and factors of old people's personality. In this sense, individual subjectness is meaningfully attributed to the specific characteristics of the self-image, the level and content of loneliness and other mental states similar to it. The psychological phenomena that comprise subjectness — both in a specific content and in general — guarantee adaptability, openness and flexibility of individual subjectness and determine its state of preservation. Subjectness plays the role of a mediator, not only determining the quality of adaptability of a young-old or an old-old person, but also his/her subjective well-being.

The role of subjectness as a mediator in the old age is not only manifested in adaptation and personal self-regulation skills of old people, but also in preservation of the integrity and self-sufficiency of their personal characteristics, in their ability to integrate and their general outlook on life and its activities.

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