SOCIAL INCLUSION

Family Supportive Networks and Practices in Vulnerable Contexts

Edited by Jacques-Antoine Gauthier and Vida Česnuitytė

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Editorial

Family in Challenging Circumstances: Ways of Coping

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Abstract
The aim of the thematic issue *Family Supportive Networks and Practices in Vulnerable Contexts* is to provide a cross-national perspective on the current state of caregiving and support practices within family networks in Europe. The articles featured in this volume were selected from among the presentations made in 2021 at two conferences promoted by the research network Sociology of Families and Intimate Lives of the European Sociological Association (ESA RN13). Authors of the most promising, topical, and up-to-date research papers were invited to contribute to this thematic issue.

Issue
This editorial is part of the issue "Family Supportive Networks and Practices in Vulnerable Contexts" edited by Jacques-Antoine Gauthier (University of Lausanne) and Vida Česnuitytė (Mykolas Romeris University).

1. Introduction

In response to the challenging circumstances produced by the current and ongoing political, economic, health, and environmental uncertainties, contemporary families are increasingly at risk of vulnerability. In the framework of this thematic issue, vulnerability is defined not only as a characteristic of a person or a group that relates to precariousness or indigence but also as a process that generates stress and loss of resources in addition to challenges of various degrees in the coping strategies of those concerned (Spini et al., 2017). Facing vulnerability potentially has an influence at the micro, meso, and macro systemic levels as well as on many, if not all, life domains (e.g., work, education, family, residence, health). These range from interpersonal relationships, conjugal and parental stability, and family–work reconciliation to migration, fertility, and life expectancy partly as the consequences of the interactions with the institutions of the state welfare system. Moreover, the fact that these life domains are largely interdependent tends to amplify the consequences of vulnerability (Bernardi et al., 2019). Eventually, vulnerability can also influence the family by challenging its conceptualization and boundaries, as well as its members' specific roles and practices (Sarkisian, 2006).

One of the central functions of the family is to provide care and support to its members. However, stressful events occurring in the life course may strengthen or weaken social ties, networking dynamics, and division of tasks and, therefore, transform family practices regarding material and emotional support. Moreover, the organization of childcare and elderly care largely depends on the availability of dedicated institutional structures and targeted social policies. Their absence may cause overload and/or loneliness (Widmer & Spini, 2017). Caregiving also depends on the availability and commitment of close network members. When individuals face adverse circumstances, they may need the support of not only their kin but also their non-kin to help them cope with the situation. Last but not least, these contextual uncertainties have an impact on gender roles and hence on practices regarding the household division of tasks and caregiving between men and women.

2. Contributions

In total, ten original articles by authors from nine countries (Czech Republic, Germany, Hungary, Italy, Lithuania, Poland, Slovenia, Spain, and Switzerland) were collected. The empirical results they offer stem from both qualitative and quantitative research methodologies and instruments. The content of this thematic issue is organized into two main parts: (a) family supportive networks and (b) family practices in vulnerable contexts. To ensure the quality of the contributions, all articles went through a double-blind review process.

2.1. Family Supportive Networks

Małgorzata Sikorska documents the tensions existing between the everyday family practices and representations that parents have of an ideal child (Sikorska, 2023). Based on a series of interviews, the results reveal that parental expectations regarding the human quality of their children may be reduced to two dimensions characterized by the opposition between independence and obedience on the one hand and between egoism and empathy on the other hand. For this author, the shift from a socialist democracy to a liberal democracy is associated with the coexistence of conservative and progressive values and practices that may have an influence on social norms, meanings, and discourses on parenthood and childhood.

Marcela Petrová Kafková explores the relationships among biographical events, the intensity of social relationships in later life, and subjective feelings of loneliness and solitude (Kafková, 2023). Results indicate that with considerable gender differences, the main reasons for feelings of loneliness in the elderly are the loss of a life partner and unsatisfactory relationships with close family members. In addition, the author notes that the social networks of lifelong singles and childless people are smaller and more diverse and are associated with more negative feelings compared to other individuals.

Irma Budginaitė-Mačkinė and Irena Juozeliūnienė turn their attention toward caregiving practices in families in which their members live on both sides of the state borders (Budginaitė-Mačkinė & Juozeliūnienė, 2023). Mass migration in Lithuania has contributed to making such situations increasingly frequent. While scientific attention has been given so far to the intergenerational caregiving triangle, intragenerational care practices remain underexplored. The authors claim that the type of relationships providing care and support to migrant families' members remains "overlooked." Findings suggest that cross-border family practices create new patterns of family relationships characterized by an "intimate, but different" type of solidarity.

Donatella Bramanti focuses on the transition of vulnerable individuals to old age to develop and implement new community networks of care in Italy (Bramanti,

2023). The representations of seniority are considered in relation to the intergenerational dialogue occurring in the care-based dyad as well as in the informal and formal networks in which elderly people are integrated. These depictions are closely connected with the quality and intensity of relationships, especially when facing stressful events.

Finally, Judit Monostori examines the factors underlying the prevalence and characteristics of living configurations in Hungary (Monostori, 2023). Results indicate that factors such as parents' lower level of education and single parenthood are becoming increasingly relevant to predict the likelihood to live in three-generation households while the influence of living in rural areas is gradually declining. At present, coresidence is more frequent among socially disadvantaged and poorer individuals and is strongly linked with the transition to parenthood of young adults living with their parents.

2.2. Family Practices in Vulnerable Contexts

Begoña Elizalde-San Miguel, Vicente Díaz Gandasegui, and María T. Sanz analyze the capability of family policies to reverse the sharp decline in fertility that has been observed in Spain in recent decades (Elizalde-San Miguel et al., 2023). Results demonstrate that family policies alone, even if they are in line with gender and social equality values, are not sufficient. The authors claim that to reach their objectives regarding fertility, public policies must adequately integrate family, employment, and educational policies to match the complex set of mechanisms and values associated with a satisfactory work–life balance.

Thomas Eichhorn, Simone Schüller, Hannah Sinja Steinberg, and Claudia Zerle-Elsäßer investigate the changes in the family climate during the first Covid-19-related lockdown in Germany (Eichhorn et al., 2023). The concept of family climate helps in assessing the level of cohesion, regulation, conflicts, and emotional closeness within the family. Findings suggest that half of the respondents reported a deterioration in their family climate. This is, in particular, the case for mothers doing more than 80% of the chores and childcare as well as for adolescents at risk of poverty and not or rarely involved in family activities. However, the authors observed systematic and substantial differences between the mothers' and the adolescents' perceptions toward changes in the family climate and hence underline the relevance of distinguishing between the perspective of children and parents in family studies.

Beáta Dávid, Boglárka Herke, Éva Huszti, Gergely Tóth, Emese Túry-Angyal, and Fruzsina Albert explore the impacts of the first Covid-19-related lockdown on the Hungarian adult population (Dávid et al., 2023). Findings show that social isolation increased during this critical period. The authors also evidence a restructuring process of the respondents' social relationships in which a proportion of their kin ties (especially those involving

children) increased whereas that of their non-kin ties (in particular, friendships) decreased. This is associated with a rise in the emotional intensity and time devoted to interpersonal communications and a decrease in the frequency of face-to-face meetings. Older individuals were the most affected by this change in sociability patterns.

Ronny König and Bettina Isengard aim at linking specific patterns of communication with objective and subjective loneliness before and after the lockdown caused by the Covid-19 pandemic (König & Isengard, 2023). Results based on data from 26 European countries show that electronic communication was often the dominant medium used to maintain relationships. Moreover, multivariate analyses evidence that online communication cannot substitute face-to-face interaction and may even potentially increase feelings of loneliness, especially in older adults.

Finally, Alenka Švab and Tanja Oblak Črnič focus on how the dynamics of family relationships changed in relation to the first wave of the Covid-19 pandemic (Švab & Oblak Črnič, 2023). Authors use the notion of "forced nuclearization" to show that some family practices and routines intensified during this period as a consequence of the closure of schools and teleworking, in particular regarding domestic chores, childcare, and work–family balance. Globally, this contributes to an increased asymmetry in the gendered division of labor and a greater workload for women. Comparable patterns of change are observed between the first and the second lockdown, although they were less marked in the latter as new routines and behaviors were already established during the former.

3. Conclusions

This thematic issue firstly provides an up-to-date perspective on family functioning in situations of stress with limited resources. Second, it presents original empirical findings based on innovative theoretical approaches and methodologies. Third, it offers an all-important international perspective on this complex, multi-dimensional, and multi-level issue that social vulnerability represents.

The editors and contributors hope that the thematic issue will be a valuable tool for researchers, teachers, students, practitioners, and all others whose interests are related to the phenomena and processes presented in the volume.

Conflict of Interests

The authors declare no conflict of interests.

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Jacques-Antoine Gauthier is a senior lecturer at the University of Lausanne's Life Course and Inequality Research Center (LIVES) in Switzerland. His current research uses a configurational perspective with a focus on modeling and analyzing longitudinal life course data. The central issue of his analyses concerns the time-related construction of individual life trajectories and their interdependencies—notably when experiencing major transitions such as entry into the labor market, parenthood, or retirement. More recently, deepening an Eliasean perspective, he got involved in research linking life trajectories and personal networks and their spatialization.

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Part I.

Family Supportive Networks

Article

"Empathetic Egoist" and "Obedient Individualist": Clash Between Family Practices and Normative Images of Children

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Abstract
The initial aim of this article is to analyze the clash between everyday family practices and parents' normative images of perfect children. I identified five sets of features and behaviors of the actual child that mirror daily parents–children interactions (including parental socialization strategies) and three sets of features and behaviors that reflect parents' perceptions of a perfect child. The analysis revealed two "dimensions of contradiction": egoism vs. empathy and obedience vs. independence. Investigating how family practices combine with parents' normative images results in insights into parents' ambivalent attitudes toward children. The second aim is to identify the social sources of these clashes. The Polish case appears to be intriguing due to a particularly rapid systemic transformation, resulting in overlapping patterns of everyday practices, divergent social norms, variant meanings, and contradictory discourses. This article's contribution is to illustrate the hypothesis that systemic transformation might have a more immediate effect on changing social norms, meanings, and discourses on parenthood and childhood (and thus change parents' normative images of children), while family practices are transformed with parents' resistance. The concept of family practices developed by David H. Morgan is employed as a theoretical framework and starting point for the study. The analysis draws on qualitative data and in-depth interviews with 24 couples of parents and six single parents.

1. Introduction

The clash between everyday family practices and parents' normative images of perfect children might seem obvious. However, that does not indicate that this phenomenon is not worth investigating. From a sociological perspective, both the dimensions of the clash and its social sources are most intriguing. The concept of family practices developed by Morgan (1996, 2011a, 2011b; see also Finch, 2007) is employed as a theoretical framework and starting point for analysis. It serves to identify everyday parents–children interactions and reconstruct parental socialization strategies. To analyze the incompatibility between family practices and parents' images of perfect children, the study of practices was supplemented by an investigation of parents' perception,

which, I argue, may be shaped by social norms, meanings, and discourses (see, e.g., Duszak & Fairclough, 2008; Fairclough, 1992; Morgan, 2011a; Nicolini, 2012; Shove et al., 2007; Swidler, 2001).

The initial objective of the article is to identify the dimensions of the clash between everyday family practices and parents' images of perfect children. The analysis of empirical data (qualitative in-depth interviews with parents) explores two issues: (a) parents' experience in daily interactions with their actual children, including parental socialization strategies, and (b) parents' normative images of a perfect child. Two oxymorons (see Lüscher & Hoff, 2013), "empathetic egoist" and "obedient individualist," highlight the parents' ambivalence, which is rooted in two contradictions: empathy vs. egoism and obedience vs. independence. The second

objective is to explore the social sources of the clash. The Polish case appears to be intriguing because of a particularly fast sociocultural, political, and economic transformation resulting in overlapping patterns of everyday practices, divergent social norms, variant meanings, and contradictory discourses (see Marody, 2021; Marody et al., 2019; Sawicka & Sikorska, 2020).

The article has been divided into the following parts: To begin with, the key assumptions of the concept of "family practices" (Morgan, 1996, 2011a, 2011b; see also Finch, 2007) are presented to provide context for an analysis of parents-children interactions and parental socialization strategies. This section is concluded by a reflection on the links between practices, social norms (understood as prohibitions and injunctions that define what is or is not socially acceptable), social meanings (defined as neutral, not normative, connotations), and discourses. Then, in the Polish context, basic information is given on the domain of family life before and after the systemic transformation (the social process of political, economic, and sociocultural changes which started in 1989). Next, the data sources and research methods are described. The presentation of the results constitutes the main part of the article. It is divided into two sections: The first section deals with a description of parents' everyday practices with the actual children (including parental socialization strategies); the second concerns parents' normative images of a perfect child. The dimensions of a potential clash between family practices and parents' images are addressed in the discussion section of this article. Finally, in the concluding section, I propose an interpretation of the social sources of "clash" drawing on background information provided in the earlier description of the Polish family life context. The study's limitations and potential future research topics are also discussed.

2. Concept of Family Practices as a Theoretical Framework

The concept of family practices was introduced by British family sociologist David Morgan. Morgan (1996, 2011a, 2011b) notes that a practice approach has been used in family studies for several decades and he only credits himself with attempting to systematize the topic of practices within the context of this scientific field. Morgan's theory is a valuable addition to the more general practice theories (e.g., Reckwitz, 2002; Schatzki, 1996, 2016; Shove et al., 2012), also called "practice-based view," "practice-based approach," or "practice idiom" (Nicolini, 2012).

According to Morgan (2011a, p. 12), "family practices are those practices which are, routinely or less routinely, constituted as such. However, we also need to think of the processes by which the external observer constitutes a set of practices as being 'family' (and not some other) practices." In other words, family practices are daily activities and interactions carried out by family members to contribute to "homemaking." Family practices involve not only family members but also others who observe these activities (e.g., teachers, neighbors, and friends), as well as social institutions whose operations may impinge on the family (e.g., the school, social assistance centers, or, more generally, the law or economic conditions). Most family practices are routine and taken for granted (Morgan used the notion of "practices as habits"). However, individuals as "carriers of a practice" (Reckwitz, 2002) or "hosts of practices" (Shove et al., 2012) have agency, as well as a causal, constructive role in redefining and constructing the meanings of practices (Morgan's term is "practices as action"). To put it another way, in a practice-based approach, individuals both reproduce and reformulate practices.

One premise of the practice approach (including the concept of family practices) is particularly relevant to my study. Practices as performance are "shaped by and constitutive of the complex relations of materials, knowledge, norms, meanings" (Shove et al., 2007, p. 13). From the standpoint of my research, the mutual influence between practices, norms, and meanings, is critical. Similarly, Swidler (2001, p. 75) underlines the significance of the feedback link between practices and discourse, which she defines not as "what anyone says, but [as] the system of meanings that allows them to say anything at all." Nicolini (2012) points out that theories of practice influence discourse at two different levels. One is the surface level of discursive practice (what people say and how), while the other is the deep level of discourse as a source of social meanings or an "external system of meanings." Thus theories of practice contribute to the articulation and reproduction of meanings that individuals can accept and implement or reshape them. Morgan (2011a) combines practices ("families we live with," applying here the term proposed by Gillis, 1996) and discourses ("families we live by") to claim that they are mutually implicated in each other. Mothering (as a practice) and motherhood (as a set of social meanings maintained in discourse), fathering and fatherhood, and parenting and parenthood are examples of this interconnectivity. The researchers focused on discourse analysis (e.g., Duszak & Fairclough, 2008; Fairclough, 1992, 2007; Fairclough & Wodak, 1997; Krzyżanowski & Wodak, 2009) also examine the relationship between language/discourse and social norms or meanings as well as individuals' activities. Fairclough and Wodak (1997) stress that discourse reproduces society and culture while also being reproduced by society and culture. In other words, discourse is both a limiting structure and a "reservoir" for individuals and social groups to produce social reality. Duszak and Fairclough (2008) emphasize that discourse is a "driving force" in social construction.

To sum up, while Morgan's concept of family practices serves as a theoretical framework and starting point for my study, reflection on the linkage between practices and social norms, meanings, and discourses, and their influences on individuals' perception, completes the

scheme of the analysis. Combining these two perspectives provides unique insights into parents' ambivalent attitudes toward children, as it reveals a clash between everyday family practices and parents' normative images of perfect children.

3. The Specific Context of Poland

The post-communist transformation, which started in Poland in 1989, had an effect on politics (the shift from socialist democracy to a liberal democracy), economics (the shift from a socialist economy to a capitalist economy), and the sphere of norms and habits. Krzyżanowski and Wodak (2009, p. 19) claim that sociocultural, political, and economic changes, "which have taken place elsewhere more slowly and over much longer periods of time," happen in Poland (and in other Central and Eastern European countries) "at a very fast pace." Since the beginning of the transformation, the domain of family life has been an area where traditional family norms and meanings met modernization discourses on parenting and childhood patterned after Western societies.

The norms and meanings embedded in traditional families (Silverstein & Auerbach, 2005) include a patriarchal division of gender roles: The father is the head of the family and breadwinner, while the mother (even if she is employed) is seen as the person primarily responsible for the household, childcare, and socialization. Adamski (1982), defining patterns of family life in the Polish People's Republic (1945–1989), highlights that, despite the constantly increasing rate of female employment, there dominated both social expectations and family practices in which women should work professionally and at the same time take care of their families. Upbringing, according to traditional family norms and meaning, was based on a hierarchical relationship between dominating adults and subordinate children, with parents' authority grounded in their social role (Żarnowska, 2004). The child was perceived as a passive recipient of adults' socializing efforts, as an "object" of socialization (Golus, 2022; Radkowska-Walkowicz & Maciejewska-Mroczek, 2017; Sikorska, 2019). During the communist era, parents listed obedience as one of the most desirable characteristics of children (Bojar, 1991). A dutiful, well-mannered child with good grades at school was a "symbol of prestige" for the family and "evidence" of the parents' success in their parental role (Podgórecki, 1976).

Norms and meanings of traditional family found and continue to find support in the narrative of the Roman Catholic Church, which is still the dominant religion in Poland: 85% of Poles have been baptized (GUS, 2018) and 87% of Poles describe themselves as "believers" or "profound believers" (CBOS, 2021). In Catholic doctrine, a family is "a school of rich humanity," "a community of life and love," and "an instrument of humanization and personalization of society" (quotation from John Paul II, as cited in Sztaba, 2012). According to the *Catechism*

of the Catholic Church, "filial respect is shown by true docility and obedience" (Catholic Culture, n.d., Chapter: The Duties of Children, para. 2216). Furthermore, "as long as a child lives at home with his parents, the child should obey his parents in all that they ask of him when it is for his good or that of the family" (Catholic Culture, n.d., Chapter: The Duties of Children, para. 2217). Czekaj (2015), summarizing the key aspects of Catholic thought on upbringing, notes that it is regarded as a parent's success when children are "voluntarily obedient." The primary duty of parents is to "form the personality of the young person" (Guzewicz, 2016, p. 42). Again, according to the Catechism of the Catholic Church, "parents have the first responsibility for the education of their children" (Catholic Culture, n.d., Chapter: The Duties of Parents, para. 2223). At the same time, as Szwed (2018) points out, the Catholic Church in Poland, to counter the allegedly detrimental effects of Western influences, develops a narrative of parental disempowerment and refers to sex education in schools as an example of demoralisation. In this context, the Church and conservatives raise the issue of "sexualization" of youngsters during school lessons (Graff & Korolczuk, 2021).

In the aftermath of the systemic transformation, the patriarchal family model has been questioned by the modernization discourses on family and parenting which are rooted in the global process of democratization of family life (Beck & Beck-Gernsheim, 2002; Giddens, 1998), the process of erosion of patriarchal model and the assumptions that the needs of the child are relevant (see Jamieson, 1998), the presumption that children's emotions are essential to the socialization processes (Land, 2004), and diffusion of intensive parenting (Hays, 1996), which "is a child-centered approach that demands great parental time, financial, and emotional investments in childrearing" (Nomaguchi & Milkie, 2020, p. 199). From this perspective, a child is viewed [by the parents] as a non-passive quasi-partner. Simultaneously, a parent is not supposed to control the child's behavior or emotions, but rather to address the child's needs, facilitate personal growth, and empower the child. Parents' empathy, communication skills, and willingness to cooperate and negotiate with their children are presumed. The modernization discourses on parenthood and childhood are present in Poland in mainstream parenting magazines, popular parenting handbooks, and online portals for parents (Bierca, 2019; Dąbrowska, 2012; Olcoń-Kubicka, 2009).

4. Data and Research Method

For this study, two rounds of in-depth interviews with 24 parent couples and six single parents (a total of 54 respondents) were conducted in 2016 and 2017. Each participating family had at least one child aged up to six years. Thirteen families had two children. The respondents ranged in age from 25 to 45. The average age of the informants was 35. The majority of respondents were

born before 1989, therefore they spent childhood during the communist era and the early years of systemic transformation. It might be assumed—and the narratives of the informants reflect it—that most of them were raised in a family model based on traditional norms.

The sample consisted of 30 families: 15 interviews were held with middle-class families living in Warsaw (the capital of Poland, with approximately two million inhabitants), and the remaining 15 interviews were conducted with working-class families living in a medium-sized town (with approximately 45,000 inhabitants). Quotes from the first group were marked from MC1 to MC15; from the second group: from WC16 to WC30. However, the empirical data analysis did not uncover any substantial or conclusive variations in terms of social class, therefore this aspect is not discussed further in the article. All respondents declared a heterosexual orientation. Adding another sampling criterion (sexual orientation) with a small sample of respondents (30 families) was not methodologically justified. A detailed description of the sample is presented in the Supplementary File.

The interviews were conducted in two waves. The majority of the questions in the first wave were focused on reconstructing parents' reflection on family norms and meanings, while the majority of the questions in the second wave were directed at reconstructing everyday family practices, relationships within families, and child upbringing strategies. Besides the theme described in this article, the following issues were analyzed based on collected material: ways of defining the family (reconstruction of a social and individual definition of family); dimensions of social isolation of families; dimensions of oppressiveness of family life and parenting; the role of the electronic devices as non-human actors in the parents-children relationship; division of roles and responsibilities between mothers and fathers.

The parents' normative images of a perfect child were reconstructed by using questions provoking to specify what a child should be like: that is, what characteristics they should have or how they should behave. Furthermore, the questions were asked about circumstances in which respondents felt proud of, or embarrassed by, their children's behavior. In addition, the projective technique (Keegan, 2008) was used: Parents were to specify what they would or would not like to put into a suitcase for their child to take with them when they left the family home. The answers to this question were read as a child's characteristics and behaviors positively or negatively rated by parents. The parents' everyday relationships with their actual children and the children's daily behaviors were reconstructed through a series of precise and detailed questions about standard weekday and weekend family schedules, joint activities undertaken by children and parents, children's daily responsibilities, situations of conflict, family issues where children have a decisive voice, rewards and penalties applied by parents and they parental strategies.

The study applied an inductive approach (Neuman, 2003). The data were analyzed using qualitative tools (Silverman, 2001), specifically the thematic analysis approach (Guest et al., 2012) with a thematic coding procedure (Gibbs, 2007). The data was coded using ATLAS.ti software (Friese, 2011). The metaphors used to name the models of a *perfect child* and the *actual children* were based either on the literal statements of interviewees or founded on my interpretation. The ethical procedure involved the preservation of the interviewees' anonymity (e.g., all names were changed; the name of a medium-sized city was coded). All interviews were transcribed verbatim. For this article, selected quotes were translated into English.

5. Results

5.1. The Actual Children: What Children Are Like and How They Behave

When analyzing how respondents describe their daily family practices and interactions between themselves and their children, I distinguished five sets of features and behaviors of the *actual child*: the child as a *beast*, a *dictator*, a *weakling*, a *cutie*, and a *person*. The first two models appeared in the interviews the most frequently, the last three far less frequently. The analysis did not cover the types of children's characters, personalities, or temperaments but the sets of attributes and behaviors revealed in everyday interactions between parents and children. The parents applied different socialization practices in relation to these types. I assumed that the parental strategies reflect the interpersonal relationship between parents and children (see Sikorska, 2019).

5.1.1. A Child as a *Beast*

Parents' narratives regarding their daily relations in the family often included the motif of children as "danger" evoked by their unpredictable behavior. The child as a *beast* was reported as troublesome for parents especially in a public space insofar as their behavior could be a source of parents' embarrassment. An excellent and often-mentioned illustration of this was a scene in a store where a child demanded sweets, toys, or gadgets and threw a temper tantrum when the parent refused to fulfill those expectations. Almost all the informants had witnessed similar situations, and many of them had this type of experience as parents. The respondents also described situations at home when their children would throw food, "squeal, scream, stomp" (WC23) while demanding sweets, toys, extended screen time, etc. Another aspect of the child being "dangerous" was related to children hitting other children or adults. Magda and Tomek (WC16), parents of a five-year-old son, reported:

Magda: He [son] beats us in front of other people. That's embarrassing.

Tomek: He will do it if he gets rebellious. Now, he seems to be doing it less frequently.

Magda: But he still would raise his hand to strike…

Tomek: When he freaks out.

Another feature of the child as a *beast* involved constant demands for sweets, new toys, extended screen time, etc. A child who doggedly insisted on what they wanted slipped out of the parents' control. In the context of demands, the interviewees very often mentioned children's use of electronic devices. The key feature of a child as a *beast* was the desire to satisfy their needs without considering other people's interests or opinions. Thus, the child as a *beast* could be described as someone who is egoistic, selfish, and cares only about themselves.

Parents' socialization practices in the context of children acting like a *beast* involved disciplining them by punishment, which involved prohibitions (most often banning electronics or sweets) and corporal punishment. Physical punishment of children has been illegal in Poland since 2010. However, 34% of respondents in the national survey disagree with the statement "no physical punishment should be used on children"; 25% support the claim "spanking hasn't harmed anyone yet," and 61% agree that "there are situations when a child needs to be spanked" (CBOS, 2019). Some informants believed that light slapping (most of them did not use the words "spanking" and "beating") was a normal way of disciplining children, but others admitted it derived from parents' sense of helplessness. Spanking and even other forms of beating were described as behaviors that respondents had often experienced in their childhood and then—as they reported—it was socially approved. The interviewees who admitted to having been beaten by their parents declared that they did not practice this kind of punishment on their children. Only one couple was an exception here: Robert (WC27), criticizing modernizing parenting discourse, recounted:

I've never had anything against [spanking children] and, for me, it's a sick thing like some people claim that you can't slap a kid. I understand that you can't do it to a small child because it's a small child, but a child of, like, nine or eight years old is already a child who understands a lot and if he does something wrong, he does it out of spite.

Another socialization practice in the relationship with a child acting as a *beast* was bribery, i.e., promising a reward (sweets, small toys, etc.) on condition that the child behaved as the parents wished.

5.1.2. A Child as a *Dictator*

The key competence of a *dictator* involved managing parents and family life. Some respondents literally declared that they felt manipulated or dominated by children. Parents frequently used the statement that children gained control over them and were "walking all over parents" (MC3, MC4, MC5, MC6, MC7, WC22, WC24, WC26, WC27). Tadeusz (MC5), father of a six-year-old boy, confessed: "We are defending ourselves because Bartek [son] would just walk all over us." Paulina (WC22), the mother of a six-year-old son, said: "Once, a psychologist told me: 'You have a very intelligent child and he knows how to manipulate you.'" Paulina's husband Grzesiek added: "Well, she told you the right thing. She told the truth because he actually can do it." A child acting as a *dictator* determined the rhythm of family practices and parents' activity. The fact that the needs of a child (especially a newborn or a baby) had an important impact on family life seemed obvious. However, in informants' narratives, a child could dominate over the parents leaving them with little scope for decision.

The parents' socialization practices focused on bribery which was at the top of the strategies employed. Some parents recognized the links between bribing applied as a socialization method and the child's getting spoiled. In this regard, Jola (WC25) confessed:

Nela [daughter] is very spoiled and I have a problem with myself because I can't set limits with her….I still feel guilty that I said something too loud somewhere, that I yelled at her.

5.1.3. A Child as a *Weakling*

When describing their everyday relationship with children, some informants underlined that children were not self-reliant or self-directed. They characterized children as incompetent, clumsy, and weak and, as such, entirely dependent on their parents. The best illustration of the relationship between parents and their child being treated as a *weakling* was the feeding situation when the child refused to eat but adults were deeply convinced that the child was hungry. Marcin (WC25), the father of a two-year-old daughter, reported:

I am convinced that she [daughter] should eat as much as she wants but my wife thinks she should eat more. And it is often the case that the kiddo just wouldn't eat anything anymore, but my wife goes: "One more spoonful, one more spoonful." I say: "Come on, stop that." And my wife goes: "One more spoonful." And she feeds one more spoonful and…the kiddo pukes.

The parents who treated their child as a *weakling* were afraid that their fragile child could be affected by the "bad influence" of "bad company" (defined as someone who abused drugs or alcohol, or who was indecent) (MC3; MC4; MC6; MC7; MC12; WC22; WC25). The informants were also concerned about their children's use of electronic devices (risk of addiction) as well as other risks

such as pedophiles, kidnappers, or "a bad wife for my son" (MC5). In general, from the parents' perspective, the world seemed to be a dangerous and threatening place for their children. Thus, the most essential duty of parents was to protect and defend them.

The socialization practices were based on the parents' belief that their children needed constant protection because they were dependent and unable to get by. Overprotection as a socialization practice was supported by permanent control. An excellent illustration is the situation described by Robert (WC27), father of six- and eight-year-old sons. The interviewee told his youngest child not to carry a plate of sandwiches from the kitchen to the room lest the food should fall off the plate. The son did not obey, the sandwiches fell on the floor, and the son "didn't get punished for it, but he got reprimanded quite loudly." Iwona, Robert's wife, concluded: "I understand that they [their sons] want to be independent, but there are some things they can't do yet."

5.1.4. A Child as a *Cutie*

Compared to the other four models, this one most commonly occurred in the context of youngest children. The child was described as "sweetheart" and "sweetie" (MC7), "lovely and nice" (WC25), "cuddly toy" (MC5), someone who was innocent and defenseless and therefore still in need of parental care. Moreover, a child as a *cutie* was considered by parents a source of parental pride. Cast in this role, the child should be polite, nice, good-looking, obedient, and—in the case of older children—have good grades at school and be an exemplary pupil.

The socialization practices consisted primarily of constant control and overprotection, which was based on the child being viewed as an innocent and sweet "little one" who needed to be pampered and carried in their parents' arms, and whose needs must be fulfilled immediately. The overprotection strategy was complemented by spoiling because parents found it hard to stop pampering their *cuties*.

5.1.5. A Child as a *Person*

A relatively small group of respondents described their everyday relations with their child as a *person*, as an individual who was independent, autonomous, and empowered to make their own decisions. It is intriguing that quite a few single parents—compared with couples in the sample—reported this type. Maria (MC13), the mother of a five-year-old son, stated:

> It is important to see your child as a little thinking human, not some stupid and still developing person. All kids already have their dignity, ambitions, needs—you just have to notice that, not ignore it. We shouldn't think kids would get the right to make decisions only once they've grown up.

A child as a *person* was a quasi-partner in the relationship with the parent. "Quasi" means that it was the parent who had the decisive voice in setting the rules, but, at the same time, the adult should be ready to "listen to the child" (MC15), to consult the child and understand their motives. Katarzyna's (MC7) statement was a perfect illustration of this approach: "I think my child is my partner. I don't treat my child as an object, and my child may have their own opinions. Sometimes, I can learn something from my kid."

The socialization practices, in this case, included discussing and negotiating. The relationship between parents and children was based on the parents' respect for their child, on mutual trust, and on the assumption that the child was able and entitled to make some decisions, which—as the parents pointed out—gave the child a sense of agency. The socialization strategies, in this case, did not focus on parental control over children.

5.2. A Perfect Child: What a Child Should Be Like

Based on the analysis of data, three sets of features and behaviors of a *perfect child* were identified. The first model (an *empathetic child*) was present in almost all interviews. Two other models (a *well-behaved child* and an *individualist*) were less frequently reported and were mutually competitive. I assumed that the traditional social norms, meanings, and the parental modernization discourse might influence the parents' normative images of a child.

5.2.1. An *Empathetic Child*

The most desired features of a child mentioned by the informants included empathy, sensitivity, "the ability to recognize the needs and feelings of others" (MC1) as well as the ability to communicate and to cooperate. The respondents emphasized that an *empathetic child* did not "contemplate their own navel" (MC8) and did not distance themselves from other people (be it family members or not). On the contrary, an *empathetic child* was involved in relationships with others and was "communicative…indeed, he can talk to anyone about anything" (MC11), "open, not shy at all" (WC22), able to make compromises, and "will admit his mistake and apologize" (MC6). An *empathetic child* was described as someone who "is able to share" (MC5), which was most commonly mentioned in the context of toy sharing, and identified as someone who had "social skills" (MC7), "was socialized" (WC19) in the sense of being embedded in social relationships.

5.2.2. A *Well-Behaved Child*

A large group of respondents (approximately two-thirds) described a *perfect child* as polite and obedient. Andżelika (WC24) said that a child should be able to "carry out parents' commands…not to be against

them," able to follow the rules established by adults and thus "cause no problems." Paulina (MC3) said: "She [her daughter] should do what I ask her to do....Then there is no conflict between parents and child, and there's peace and quiet." A *well-behaved child* would recognize and respect the limits set by the parents, i.e., refrain from overstepping them. Such a child should be well-mannered and should "know what the word 'no' means" (WC27). A *well-behaved child* obeyed their parents and other people whose authority came from their social roles, such as teachers or educators. Another important feature of a *well-behaved child* was "respect for parents" (MC5) and others (e.g., seniors, extended family members, and neighbors). As Paulina and Grzesiek (WC22) said: "Respect means following elementary rules of good behavior, such as saying 'good morning,' 'please,' 'thank you,' 'excuse me,' and so on. *Savoir-vivre.*"

In the case of a *well-behaved child*, some interviewees declared explicitly that their children did not fulfill their expectations. For example, Ewa and Piotr (WC20) complained: "The best thing would be to tell the child once or twice and that's it, he will know. And with us it is just going over and over, and over again." Other sources of parents' disappointment included their child's use of dirty words and impolite behavior.

5.2.3. An *Individualist*

When compared with an *empathetic child* and a *well-behaved child*, this model was mentioned least frequently. In many ways it contradicted the *well-behaved child*. An *individualist* did not "have to be polite" (WC19), had the right to be "unruly" and "not perfect" (MC15). Mateusz (MC2), the father of a six-month-old daughter, said that, when describing a *perfect child*, his first thought was the following: "It's what most people would like—[they should be] polite. And then I thought: No, no, no. A good child doesn't have to be polite. I don't quite like this term."

An *individualist* was described as someone who obeyed their parents but did not always follow their every command. The ability to make decisions was essential in this case. It was also particularly important that a child should be independent, not submissive, with "a strong character, and [unlikely to] give in to all those who want to persuade him to do something" (WC26). Children described as *individualists* were nonconformists and had "the ability to maintain their opinions, their convictions" (WC30), "believe in themselves and their skills" (MC10), and had sufficient self-esteem. They should not be "losers" (MC8; MC10; WC17) or "dorks" (WC23). An *individualist* should respect others but, in this case, respect was not equated with following the rules of conduct or being polite (as in the case of a *well-behaved child*), but having "respect for the whole world, openness" (MC1), being "open to everything, new people, new places, new events" (WC30), and being tolerant.

6. Discussion of the Results

Two oxymorons in the title of the article ("empathetic egoist" and "obedient individualist") indicate two dimensions of the clash between the daily family practices and the parents' normative images. The first dimension is rooted in the continuum between a child who is empathetic, communicative, embedded in social relationships, who is able to communicate, vs. a child who is egoistic and selfish. The second dimension refers to the continuum from an obedient and parent-dependent child to a child who is an independent, autonomous individual (see Figure 1).

Four significant points emerge from an analysis of the two contradictory dimensions. Firstly, in parents' normative images, empathy, openness to others, social skills, and ability to cooperate and share (e.g., toys) are the most desirable qualities of children. Meanwhile, four out of five sets of features and behaviors of the *actual children* (a *beast*, a *dictator*, a *weakling*, and a *cutie*) are focused on attributes such as egoism, self-centeredness, and unwillingness to communicate and cooperate.

Secondly, two models of a perfect child (first of all an *individualist* but also an *empathetic child*) portray a person who is an independent, autonomous decision-maker, capable of coping with daily problems. Meanwhile, the sets of features and behaviors of a child as a *weakling* or a *cutie* focus on obedience, politeness, and being constantly under parental supervision. For a *beast* and a *dictator*, disobedience and naughty behavior are essential elements of the parent-child relationship, and such behavior could be interpreted as a sign of independence. However, parents' socialization practices in relations with a *beast* and a *dictator* (disciplining by punishment or bribing) consist primarily of regaining or keeping control over the children. Summarizing, on the one hand, parents emphasized that a child should be autonomous but, on the other hand, they applied socialization practices (overprotection, control, and penalties, including spanking) that limited children's ability to be independent and take unassisted decisions. Some interviewees emphasize that parental control is particularly important due to a variety of risks (e.g., associated with the Internet and social media) that did not exist when they were children.

Thirdly, two models of a perfect child (an *empathetic child* and an *individualist*) are founded on unrealistic assumptions. To a large extent, they correspond to a list of highly qualified professionals' soft skills (e.g., the ability to cooperate, compromise, be empathetic, etc.). Meanwhile, models of the *actual child* are either grooming and infantilizing (as a *weakling* and a *cutie*), or dehumanizing (as a *beast*). Only a child as a *person* is seen as a partner in the relationship with the parent, and a child as a *dictator* can even dominate such a relationship.

Fourth, only one of the three models of the *actual child* (a child as a *person*) is consistent with the collection of features and behaviors of *a perfect child* (*empathetic child* and *individualist*). Thus, the other four models of
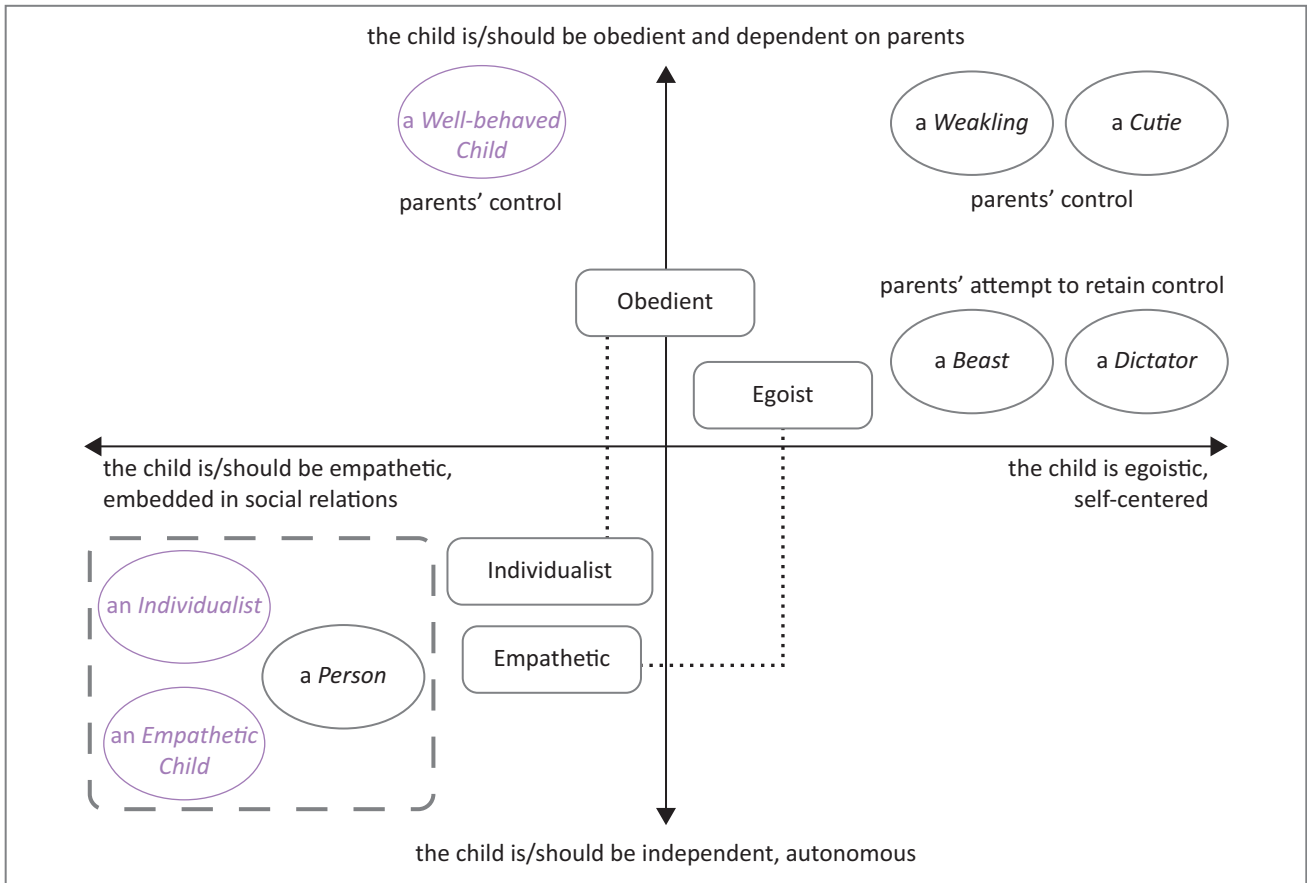
Figure 1. Two dimensions of contradictions between daily family practices with the actual children and parents' normative images of a perfect child.

the *actual children* are not grounded in the normative images of a child that are accepted and desired by parents. In other words, children who have the characteristics of these four models (a *beast*, a *dictator*, a *weakling*, and a *cutie*) behave quite differently from what their parents would desire.

To sum up, two out of the three models of a perfect child have a match in the parenting modernization discourse, while four out of five models of the actual children are rooted in the traditional norms and meanings regarding family and the hierarchical pattern of socialization, based on one-sided (parental) domination. A partner-like relationship and children's autonomy lie at the foundation of the modernization discourse, whereas a hierarchical relationship and obedience are the cornerstones of the traditional family model and socialization based on the lack of a partnership between parents and children. The modernization discourse is organized around children and their needs; the traditional norms, on the contrary, revolve around parents and their prerogatives. In other words, the understanding of the empowered child is inherent in the modernization discourse, while the perception of the child as an "object" is incorporated into the traditional norms and meanings concerning socialization. The child-oriented modernization discourse organized around a child and their needs contrasts with the patriarchal model organized around parents and their prerogatives which still dominates family practices and parenting strategies (see Sawicka & Sikorska, 2020).

7. Closing Remarks

What are the social sources of the clash between family practices and the parents' normative images of children? One possible source might be the uneven impact that the systemic transformation had on family practices and social norms, meanings, and discourses and thus on parental normative images. Fairclough (2007, p. 51), emphasizing that social change is often initiated with new discourses, at the same time claims: "Social fields, institutions, and organizations are 'intransitive' realities that have properties that make them more or less amenable or resistant to particular directions of change." Besides, Fairclough reminds us that systemic transformation involves a mixture of "old" and "new." I want to point out that, in the context of the domain of family life in Poland, "new" modernization discourses influence parents' normative images of a perfect child, but hardly reach "old" family practices and parenting strategies. In other words, parents commonly invoke the key elements of the modernization discourse (in short,

the empowerment of children) when discussing normative images of children, but in daily family relations, in socialization strategies, they rarely rely on the principles upheld by modernization discourse.

The practices are processual in character and are not just configurations of different elements and influencing factors. They endure, reproduce, and change over time. Moreover, practices depend on historical, cultural, and social contexts; they have their own past, present, and future. Although they do shift, every new form of practice contains some old elements (Shove et al., 2012). In other words, due to the entanglement of family practices in historical, cultural, and social contexts, they are changing against stronger parents' resistance than their normative visions of children. In the Polish context, two factors might be thought of as "brakes" on changing family practices and parental strategies. The first one refers to the traditional norms and meanings, which strongly influenced the everyday routines known to modern-day parents from their own childhood. Here, one can see that Morgan's "practices as habits" (i.e., practices that are relatively unreflectively reproduced, including practices familiar to present parents from their childhood) significantly exceed "practices as action" (practices that are redefinable and reframable by individuals by default). The other important factor is the influence of the Roman Catholic Church doctrine supporting the dominant role of parents in the parents-children relationship. In addition, the social norms based on treating children as "objects" and disregarding their opinions are still quite robust (Golus, 2022). Meanwhile, the ideas characteristic of the modernization discourse on family and parenting are a fairly recent addition to the Polish imaginarium. Sawicka and Sikorska (2020, p. 420) claim: "Modernization discourse which penetrated into Poland after the systemic transformation of 1989 brought meanings that were in opposition to those embedded in the traditional models of interpersonal relations." For these reasons, the influence of modernization discourses on everyday parents-children interactions is limited. The clash between parents' normative images of a perfect child and everyday family practices could be interpreted as an illustration of the hypothesis that systemic transformation might have a more immediate effect on changing social meanings and discourses (and thus on parents' normative images) while family practices are transformed with resistance.

The research has some limitations. One of them has to do with the question of whether evaluating practices based on interviews with respondents replicate what they actually do (practices) or just what they claim to do. Four solutions were applied in my study to overcome this problem. Firstly, the scenarios for two waves of interviews comprised a series of specific and detailed questions about parents-children relationships. Secondly, the moderators (the research team consisted of three researchers and me as a principal investigator) were instructed to ask about specific behaviors and, in absence of definite answers, to query. Thirdly, with the exception of six interviews with single parents, the interviews with two parents were performed concurrently, allowing for a cross-conversation of what parents said about practices. Fourthly, all researchers took field notes to capture their fresh impressions and initial findings (Angrosino, 2007) and then confronted and discussed preliminary results. I believe those methods effectively help eliminate the situations in which interviewers' narratives differ significantly from their realities. With this in mind, I believe that conducting in-depth interviews could be an effective method for investigating practices.

Another limitation of the study is the implementation of research with parents of predominantly younger children (however, some of the interviewers were also raising teenagers). I am convinced that future studies of parents' relationships with older children would provide interesting comparative data. Another theme worth investigating further is the differences between single parents and parental couples. As mentioned in the Section 6, single parents discussed their interactions with the *actual children* in the context of children as a *person* more frequently than couples. This issue should be explored with a larger sample of single parents. Furthermore, the use of the concept of ambivalence in parents-children relationships in a future investigation, although conducted from a sociological (see Connidis & McMullin, 2002) rather than a psychological perspective, appears scholarly promising.

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Conflict of Interests

The author declares no conflict of interests.

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Article

Sources of Loneliness for Older Adults in the Czech Republic and Strategies for Coping With Loneliness

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Abstract
In this article, issues of loneliness and exclusion from social relations in old age are examined from the perspective of older men and women. Our focus is on sources of loneliness they themselves perceive and what strategies they use to cope with it. Twenty-nine interviews with older adults at risk of loneliness in the Czech Republic and their models of social convoys are analyzed. Surprisingly small gender differences in feelings of loneliness are found. A major source of loneliness for both men and women is the loss of a life partner. Perceptions of loneliness and the shape of social networks differ substantially in the case of lifelong singles and childless people. A second significant source for feelings of loneliness includes unsatisfactory relationships with close family. Based on the participants' accounts, three strategies for coping with loneliness are identified.

Keywords
gender; loneliness; marital status; older adults; social exclusion; social relations

1. Introduction

The lack of social ties and loneliness in old age are issues that have rapidly raised the attention of scholars and politicians alike, who seek to improve the quality of life among older adults. Although the direction of the inter-relationship between social ties and loneliness is still not clear, the existence of mutual relations is not disputed. Loneliness and exclusion from social relations are interconnected with lower life satisfaction (Bai et al., 2018), lack of self-confidence (Masi et al., 2011), and anxiety and pessimism (Cacioppo et al., 2006). Older adults experiencing loneliness have self-rated their health as worse than people who are not lonely (Coyle & Dugan, 2012; K. J. Smith & Victor, 2019; Sunwoo, 2020). Loneliness is connected with low daily activity engagement, low satisfaction with social relationships, and low levels of emotional closeness in social networks (Sunwoo, 2020). Loneliness can be understood as an unpleasant or unacceptable feeling that arises when, regardless of objective aspects, individuals would like to have more and/or bet-

ter social relations than the ones they have (Perlman & Peplau, 1982).

Due to its significant impact on life quality, social isolation and loneliness among older men and women have been identified as a key challenge at the national and international levels (European Union, 2021). Although social exclusion has been primarily understood as the experience of poverty and material deprivation, it is a multidimensional concept that includes the relative absence of social relations (Walsh et al., 2017). The concept is broader than simply a lack of social contacts. Exclusion from social relations can be understood as a "situation in which people are socially and emotionally disconnected from adequate levels of intimate relationships, social networks, social support, and/or social opportunities" (Aartsen et al., 2021, p. 27). Loneliness is one of the individualized impacts of exclusion from social relations, and it can also be an individual-level predictor of this type of exclusion. The relationship between poor health and well-being is similar (Aartsen et al., 2021). Not all lonely people are excluded from social relations, just

as not all socially excluded people feel lonely. Neither loneliness nor exclusion from social relations can be confused with living alone, although loneliness and living alone, in particular, are often seen as interchangeable (A. E. Smith, 2009). Moreover, single living is seen as a risk factor for loneliness (Wenger et al., 1996). At the same time, some studies show that it is exclusion from social relations, rather than feelings of loneliness, that significantly affects health (Steptoe et al., 2013).

Social relations can be characterized by their quality and quantity. Their comprehensive capture is made possible by the social convoy model (Kahn & Antonucci, 1980), which conceptualizes social reality as a collection of people who surround individuals during their life course. Convoys are dynamic; close relationships remain relatively stable over the life course, while more distant relationships may shift based on changing life circumstances (Antonucci et al., 2014). The social convoy model recognizes that, even in old age, social networks do not only shrink but may also expand, growing through new members or changes in the importance of existing members. The interdependence of social network size and geographic distance is dependent on the cultural context, and the association of age and sense of closeness with the frequency of contact and the presence of children in networks is universal (Ajrouch et al., 2018).

There are considerable differences among countries concerning degrees of loneliness. More older adults in Eastern Europe suffer from loneliness than in Western Europe (de Jong Gierveld & Tesch-Römer, 2012). Older adults in Central and Southern European nations appear to be the loneliest among Europeans when controlling for socio-economic variables (Shiovitz-Ezra, 2015). Based on SHARE data, Sunwoo (2020) concludes that only five percent of older adults (65+ years) in the Czech population suffer from loneliness and finds no differences between men and women.

1.1. Household Composition and Family Differences

The possibilities for social relationships (not only in old age) are conditioned by the structure of families. Spouses and children comprise important close contacts, even if adult children live in separate households, typical for the Czech environment. However, their importance in preventing loneliness in old age is unclear, and scholars have presented contradictory results. Sunwoo (2020), based on an analysis of SHARE data for the Czech Republic, finds that variation in the sample of older adults (age 65+ years) is substantial. The widowed, the divorced, and the young-old experience significantly higher levels of loneliness. Those with single-person households and more than four in a household are more likely to score high on loneliness compared to those with a household size between two and three (Sunwoo, 2020, p. 5). Similarly, Štípková (2021), based on the same data source, finds that married older adults have the lowest levels of loneliness and, together with widowed

men, have the largest network of intimates. According to the analysis, the only characteristic of close social networks that has an effect on loneliness is the presence of a partner in social networks. De Jong Gierveld and Tesch-Römer (2012) come to the same conclusion about the importance of partnerships when testing the effect of household type on loneliness in old age and conclude that only the presence of a partner has an effect. Based on these findings, it seems that feelings of loneliness are not necessarily influenced by the form of social networks or relationships with adult children; the main factor appears to be the existence of a partner relationship. However, it is not entirely clear from these data whether it is the partnership itself that is the influencing factor or just the presence of someone else close to the household.

Moreover, a partnership seems to influence the meaning of other relationships. Pinquart (2003) finds different meanings concerning adult children for respondents living in and out of marriage. Adult children are more important in preventing loneliness for single adults than for married respondents, and siblings, friends, and neighbors became more important for those respondents who have neither a spouse nor adult children. A study from a Portuguese setting shows that the social networks of childless older adults are smaller but more diverse and include more friends and neighbors (Vicente & Guadalupe, 2022). The childless subset reports more feelings of loneliness, along with less life satisfaction and less network reciprocity. In Italy, the childless are likely to lack the forms of support most needed in cases of ill health (Albertini & Mencarini, 2014).

Childless older adults are perceived as more vulnerable to social isolation because their networks consist of peers; when they need care, these friends and acquaintances do not step in and they are reliant on professional services (Dykstra, 2006). In a different vein, Djundeva et al. (2019) find that, in the case of older adults living alone, the relationships between social networks and well-being reveal that both kin and non-kin network members contribute to better well-being, even after controlling for marital status. Vicente and Guadalupe (2022) conclude that network reciprocity emerges as the most influential predictor of loneliness and also acts as a significant factor in explaining life satisfaction. Health, gender, age, and income, rather than childlessness/childhood, have a major influence on well-being.

1.2. Gender Differences in Loneliness and Exclusion From Social Relationships

Gender plays a crucial role in the shape of social relationships. Gender differences in social relationships seem to be universal in the European context (Ajrouch et al., 2005). Women tend to have wider, more supportive social networks, including more non-family members (Liebler & Sandefur, 2002) and more members that they consider very close (Antonucci et al., 1998). Women are

also typically those more actively involved in maintaining social ties, and, thus, for example, have more frequent contact with their adult children (Greenwell & Bengtson, 1997). In the Czech Republic, in the pre-1989 era, this contact had taken the form of a persistent maternal role that did not end with children's adulthood; women continued to care for their households, despite their full employment during the socialist era (Možný, 1991).

Schwartz and Litwin (2018), in their analysis of social network change with age using SHARE data, find that older men and women do not differ in the amount of contact they have lost. What does differ is the number of new contacts, with women experiencing a greater increase in close ties, not always new network members, but an increase in the importance of previously more distant relationships, for example, the inclusion of important friends in close contact. Accordingly, for women, social networks have generally increased with age as non-familial relationships have increased. Similarly, Antonucci and Akiyama (1987) find that older women have larger social networks than men and provide as well as receive more support. Women's social networks are also more diverse, including more friends and as many family members as men's social networks. Men tend to rely on their spouses exclusively. However, findings of significant gender differences in the form of social networks may no longer be relevant given the generational change in the older population. More recent research tends to agree on smaller differences.

Some scholars suggest that loneliness itself might be reported by women significantly more often also because men perceive loneliness as disparaging their masculine identity (Ratcliffe et al., 2019). Women are more willing to avow feelings of loneliness than men (Victor et al., 2006). When asked about loneliness indirectly, men's and women's responses are similar (Pinquart & Sörensen, 2001). Similarly, aging itself poses a challenge to masculine identity. In situations in which a couple ages together, partners tend to care for each other, with masculine activities shifting from the workplace and community home towards the family and the marital relationship (Jackson, 2016). The effects of this shift in men's activities on the form of their social relationships are not yet well understood. Regardless of family status, men consider partnerships more important than women (Dykstra & Fokkema, 2007).

Results on gender differences in loneliness remain inconclusive, but as far as they have been detected, they are generally small and may be the consequence of the unequal distribution of risk factors across groups of men and women (Pinquart & Sörensen, 2001; Victor et al., 2006). The higher incidence of loneliness among women can be fully explained by the unequal distribution of risk factors among men and women (e.g., women more often become widowed; Aartsen & Jylhä, 2011).

In this article, the perceived sources of loneliness among older adults in the Czech Republic are examined. Loneliness, as a subjective feeling, is analyzed in the context of the broader concept of exclusion from social relations. The main focus is on the perception of loneliness by older adults themselves.

2. Methodology and Data

The findings presented in this article are based on the qualitative part of a larger European mixed-methods study (the project GENPATH—A Life Course Perspective on the Gendered Pathways of Social Exclusion in Later Life, and Its Consequences for Health and Well-Being). The research is focused on capturing lived experiences regarding relational changes across the life course (Antonucci et al., 2014), the implications of these changes on multiple forms of exclusion from social relations (Burholt et al., 2020), and the role of gender in social relations and their transformations (Aartsen et al., 2021), specifically in the Czech Republic. Twenty-nine interviews were conducted. The average age of the participants was 74 years, and 12 of them were men. Marital status breaks down as follows: married and living together with a spouse (3); married and living separated from a spouse (1); never married (3); divorced (10); widowed (12). Most participants were of Czech origin, with one participant from Hungary and one from Russia. More than half of the participants (16) have a (self-reported) disability. Participants were recruited both within the researchers' wider social networks and with the help of NGOs focusing on helping lonely older adults.

Interviews were based on a semi-structured interview guide and a graphical representation of the participants' social convoy, in which participants were asked to map their relationships hierarchically onto the convoy model's concentric circle diagram (the resulting diagram has not been analyzed for this text, but participants' verbal descriptions of it are part of the interviews analyzed). The sample consisted of older people at risk of loneliness, typically living in a single-person household or without close relatives, or with close relatives at a greater distance. Due to the Covid-19 pandemic, only some of the interviews were conducted in person; the rest were conducted via telephone (the offer of an online interview was not chosen by any participant). Although a telephone interview may produce significantly different results from a face-to-face interview, in our case, we did not find any substantive differences. In the case of telephone interviews, the necessary documents (the social convoy model diagram and the informed consent) were sent to the participants in advance by post with a stamped return envelope. In these cases, the social convoy model was either completed directly by the participant and sent to the research team after the interview, or completed by the researcher based on the participant's instructions, depending on mutual agreement.

The interview sample included men and women aged 65 years and over (the age of 65 was mandated for all participating countries; however, in the case of the Czech Republic, one participant was aged 64), from both

urban and rural settings. In addition, to increase variation among the sample, we included people with disabilities, people from the LGBTQ+ community (1), and from a variety of ethnic and social groups. Participants were informed about the objectives of the study and how issues of confidentiality were addressed. The recordings of the interviews were transcribed verbatim. The analysis was based on constructivist grounded theory (Bryant & Charmaz, 2007; Charmaz, 2014), consisting of repeated readings of all transcripts and coding essential parts of the interviews, comparing constantly with quotations from other interviews to identify patterns in the data.

The standard ethical procedures of written informed consent and the anonymization of published excerpts were applied to protect participants' privacy and rights. Data collection and analysis were conducted following ethical guidelines and were approved by the Ethics Committee for Research at Masaryk University (approval number EKV-2018–072).

3. Results

3.1. Long-Term Partnership as a Dividing Line Between Loneliness and Non-Loneliness

Although our primary interest was to explore gender differences in the feelings of loneliness and exclusion from social relations among aging men and women, throughout the analyses it turned out that gender was not a crucial characteristic; on the contrary, it held unexpectedly little significance. Partner trajectory and childlessness/childhood instead proved to be absolutely crucial. Two quite specific cases with different perceptions of loneliness included people living outside of partner relationships and childlessness (see Section 3.3). Widowhood is a typical experience in old age and, in the Czech environment, it is experienced by women significantly more often than men. Apart from the emotional burden, widowhood in the Czech context usually implies a transition to single living. For those who have lived most of their lives in marriage, the loss of a life partner is a major turning point. In her narrative, Elen, a 67-year-old widow with three grown children, clearly associates widowhood with loneliness: "I am a widow….One gets up in the morning alone, one is alone all day, and one goes to bed alone….You miss him…you miss the person next to you." She directly associates her feelings of loneliness with widowhood, reflecting on the absence of a spouse in the household. Regardless of the length of the period of widowhood and the quality of one's relationship with one's children, the feeling of loneliness cannot be completely eliminated, only suppressed through various strategies. Štěpán, a 67-year-old man, sums up his experience in a similar way:

> I'm alone. Yeah, and I'm really well aware of it. The fact that I'm alone is more or less…now I've moved into a one-bedroom flat. That means I'm not count-

ing on change. And I was just commenting that it's actually a retreat. And it's more or less an emergency. Personally, I think of people as couples, yeah. Also, in a lot of things, basically things lose meaning if they're not *shared with someone*. Yeah…that's how I think of it. So, yeah….You feel there's a definite loneliness in these things. Yeah, it is. And there's nothing I can do about it. And, basically, not to be lonely, I have to be very active. Yeah, it's actually due to my activity. Because obviously, I have kids, I have this. (emphasis added)

Štěpán is long divorced and has experience with multiple partnerships. Although he has a different life path than Elen, his experience of loneliness is very similar. He perceives the feeling of loneliness as a consequence of not living in a partnership and of a lack of cohabitation. For him, it is not the mere absence of the other in the household, but the impossibility of sharing exceptional as well as everyday experiences. This inability to share cannot be compensated; it can only be resisted and suppressed (coping strategies are discussed in Section 3.4). Although Štěpán says he has already given up on trying to find a partner, he considers this an unpleasant concession forced by his situation. Despite good relations with his children, these family ties are not sufficient to prevent these feelings of loneliness. However, this is not an experience that has emerged with old age: Štěpán also speaks about the fact that this feeling of loneliness has been with him all his life due to the instability of his partner relationships.

Sofie, a 75-year-old woman, has been feeling lonely since becoming a widow although her son and his family live in the immediate vicinity and she has regular contact with her daughter by phone. A one-person household is a source of loneliness for her. Her husband's death marked a significant transition because it was preceded by a period of intensive caregiving, in which her daughter and another caregiver were heavily involved. Sophie's daily routine and regular social contacts had thus been completely transformed. Her sense of loneliness is exacerbated by the fact that she lives in a house in the suburbs and relies on the help of others for more distant mobility. Her husband's death has turned her apartment into a quiet place, in stark contrast to her previous experience with the frequent and intensive presence of others helping to care for her husband. The loneliness is significant for these participants even though they have strong relationships with their children and also have rich wider social networks. The stories of Elena, Štěpán, and Sophie have been chosen as typical, well illustrating the loss of a partner.

3.2. Conflicting Family Relationships

When widowhood or divorce are accompanied by complicated relationships with children, grandchildren, siblings, and other close relatives, these transitions not

only cause a sense of loneliness but significantly reduce the quality of life in old age. Some of the participants in our research had experienced very complicated relationships with their close family, in which domestic violence or alcoholism was present. Their infrequent contact with their children is often the result of long-term complicated relationships. The problematic nature of family relationships is illustrated by Pavlína, an 88-year-old woman:

> And as far as the family is concerned…I have a daughter and a grandson. And when my husband was alive, he kept giving them money and more money so they would come to our house…[so] they would come. And [my] daughter has a quarrelsome nature. She's been a naughty, troubled girl since she was little. I can't get along with her at all. She would fight all the time. And she's selfish. I had a son, but he died in childhood.

After Pavlína became a widow, her relations with her daughter and grandson—her only close relatives—gradually escalated until contact was almost entirely severed. Although Pavlína defines herself as someone who has had many friends and easily meets new acquaintances, she did not maintain any contacts at the time of the interview, living in considerable isolation. The closest person to her is the home caregiver, who visits her regularly and provides her with basic assistance. However, the reason for Pavlína's social isolation is not only the result of her conflicting relationships with those close to her; it is also due to Pavlína's health condition. Mobility limitations do not allow her to leave the flat. Her opportunities to maintain or build broader social ties are thus severely limited. Pavlína's narrowing of her social ties to the home caregiver is not unique among the participants in our research. It is accompanied by feelings of loneliness, as well as a negative perception of one's life situation. In our sample, this situation is typically associated with a certain passivity in social relations or a lack of agency.

3.3. The Case of Lifelong Singles

> I do realize that one should be with someone, yeah, now, at this age, 71….But I couldn't do it anymore. I know that every old person has their habits, their routines, their families, all kinds of things. I can't do anything now. Yeah, I can't do that anymore. It wouldn't work….But I don't miss it. I don't miss it, but the mistake was that I…that somehow, I should have had at least that son, that daughter, that I should have had some kid. I'm only just realizing that now. (Marek, 71, man)

The importance of partnership in old age is clearly perceived by the lifelong single and childless Marek, but, given his life biography, it is something useful to others

rather than to himself. The long-term experience of partner cohabitation, coupled with the loss of a partner, is a vector that brings a sense of loneliness in the perception of aging. Those who have lived without a partner for their entire adult life or for a long time (like Marek) do not necessarily perceive this fact as a source of loneliness. In their view, it is rather their childlessness that leads them to the risk of loneliness; they do not attach such fundamental importance to the partnership itself. As Běta, a 67-year-old woman, explains: "I sometimes see the horror of being alone and something can happen to me." Childlessness brings a sense of fear to Běta that she will be left without help in case of health problems or an accident. She is not referring to short-term help in a crisis, but to the need for long-term care. In her eyes, childlessness makes her dependent on the help of professional services. While she herself cared for her mother until her death and allowed her to die at home, she has no one so close to her. The experience of caring for a dying mother in the home environment is very significant in Běta's narrative. She returns to it repeatedly. She also repeats that it was a matter of course; she did not have to decide on it, because her mother had similarly cared for her mother until the latter's death. She sees this as a moral obligation, which she does not question, but which her own childlessness violates.

Marek and Běta do not feel lonely; they list a considerable number of friends, neighbors, and former colleagues as part of their social networks. A deeper exploration, however, shows that these are dense but not very intimate networks. None of their relationships allow for confiding in someone. In terms of closeness, they are community ties rather than intimate relationships. If we view their social relationships not through the narrow lens of feelings of loneliness but rather through the broader lens of exclusion from social relations, both are at high risk.

Loneliness is therefore linked to the lack of an existing immediate family, not simply to its absence but to its loss of adequate contact. Our data do not show any differences in loneliness between older men and women. Men only speak more clearly about the lack of the possibility of sharing experiences, and women more about the lack of the presence of a partner in the home. Thus, the dividing vector in the sources and experience of loneliness in old age is not a gender pathway but a partner pathway.

3.4. Strategies for Coping With Loneliness

Although the interviews had not directly focused on strategies to counter feelings of loneliness, some of our participants talked about ways they struggle and cope with feelings of loneliness. We have identified three types of strategies in their narratives: (a) actively seeking out activities and encounters; (b) enjoying the solitude; and/or (c) slowing down. Crucially, participants themselves describe their strategies as their ways of coping with loneliness. Thus, their approach is an actor-centered

proactive one, which has a significant positive impact on their quality of life.

3.4.1. Actively Seeking Out Activities and Encounters

Well, of course, I feel lonely. Of course. I feel that way almost every day. Of course I do. Well, if I'm here alone, of course. But I'll get over it….You can't think about it all the time. I've got to keep myself busy, and I've just got to get over it somehow….I've got to get a job or something to get over the loneliness somehow. TV or something. Just something. I have to find the strength within myself and suppress [the loneliness]. (Jitka, 91, woman)

I can't say that I feel lonely because, first of all, I'm in that cottage among…old residents who live there [nearby], so I don't feel so lonely, I still have, like, somebody next to me. And….I don't know, I guess the kids got me out of not feeling lonely….I'm just always on the run somewhere and I'm always creating something and…trying not to be alone at home and not to cry. And on top of that, I have a garden that I work on, which means that, even though I have health problems…it satisfies me. So much so that I am just satisfied. (Elen, 67, woman)

Both Jitka and Elen are widowed women living in one-person households. They actively fight the feeling of loneliness by looking for activities. Finding an activity, going out among people, or phoning a friend are among the most frequent coping strategies mentioned by our participants. The range of activities is very wide and varies from watching television to organizing regular trips for a larger group of people, as well as civic participation and keeping in touch with long-time friends; while for the more frail participants it is generally a matter of phoning friends or watching television, for the fitter ones it can be a "life on the move," i.e., one day after another purposefully filled with activities, as Elen asserts. An active approach is associated with a positive perception of one's own situation and well-being.

The activities that participants discuss are very varied and include both meeting other people and activities carried out more independently (e.g., home maintenance and gardening). Some are more physically demanding and some are more passive. The level and type of activity, at least among our participants, do not differ between men and women but rather depend on physical limitations. Participation in the organization of social activities, as well as care for a house and garden, could be found among both men and women. One specific activity not mentioned by men as a strategy against loneliness is phone calls to friends, typically mentioned by women with limited mobility.

Vladan, a 70-year-old man, provides a contrasting example to the agentic older people, with his passive approach to social relations:

Sometimes, yes. I'm here alone most of the time. I can keep myself occupied….I'm going to put it succinctly: I still have, like, things to do. But sometimes things start to hurt more and so….And I just wait patiently….I don't mean [waiting] for death, no, but until I get a little bit better again, or until someone calls me, or until someone gives me a good word.

Vladan, like Jitka, talks about his ability to find activities that help him overcome his feelings of loneliness; however, unlike Jitka, who actively maintains her relationships, he is passive. He is waiting for someone to call him, someone to visit him, someone to comfort him. If he does not feel well, he passively waits to see if someone will please him with a visit or a phone call. This inactive attitude, combined with mobility limitations, significantly reduces Vladan's well-being. Unfortunately, the nature of the data does not allow us to distinguish whether lower levels of well-being lead to a passive approach to relationships or, on the contrary, a passive approach to relationships reduces well-being. Although confinement in a flat due to mobility-related disabilities poses significant difficulties in maintaining social relationships, this passive approach is not characteristic of all participants with mobility limitations.

3.4.2. Enjoying Solitude

In addition to purposefully seeking activities and initiating encounters, satisfaction with being alone, with one's solitude, is identified in the interviews as another successful strategy for coping with loneliness:

I like my alone time. Well, I like being alone more and more as I get older….I'm fine when I'm alone….But [this is] because I still have my family here, some of them are here…so….But overwhelmingly, compared to when the question was asked, what [has] changed [with] old age is that I'm more of a loner and I'm realizing more and more that I'm comfortable with that. I can say [that] I've liked people, that very few people have annoyed me or anything [like that]….But I [always] liked the times when I was alone. Well, in my old age, I like being alone more and more. I'm fine when I'm alone. (Karla, 75, woman)

Enjoying solitude is an increasingly popular activity for Karla as she gets older and as her peers pass away. She enjoys spending time with her children and grandchildren, but she does not require their regular presence; the feeling that they are well and doing well is enough for her. Enjoying her time alone is a conscious strategy she uses to adapt to the changes in her social networks. However, this is possible because she has a solid and satisfying social network. Her social activities include regular contact with her family, as well as numerous wider friendships, and regular trips with the hiking club to which she belongs.

3.4.3. Slowing Down

Similar strategies are used by Antonín, a 78-year-old man, although in his everyday life he is more likely to be in his house, garden, and immediate surroundings:

> [In the past] sometimes I [have] felt lonely. Maybe even lonelier than I am now. So now I'm….I've just shifted gears, as they say. I'm just quite comfortable with the solitude. Well, there's a mess. I'm over there shelling nuts in front of the TV and stuff, so it's a bit of a mess. If my wife came back, she'd give me hell. But I don't feel lonely. Because I have a dog, I have these three cats, I have ten rabbits.

Since becoming a widower, Antonín has lived alone in a house on the outskirts of a big city. He devotes his time and energy to gardening and breeding animals. As a former university teacher, his social network is enriched by students who come to him for tutoring. The tutoring of students is an activity he controls the frequency and intensity of. He associates his enjoyment of solitude with another successful strategy, and that is slowing down in old age. Although a one-person household means that he spends most of his time without the presence of another person, which creates a feeling of loneliness, he can decide when, where, and for what purpose he meets someone in an active way, according to his strengths and needs. He finds it convenient to cut back on activities as he gets older. Taking care of the house, his garden, and his pets provides him with a variety of activities and a sense of usefulness (the data do not allow us to comment on the role of pets in preventing loneliness; however, on the importance of pets for quality of life in old age, see, for example, Vidovićová et al., 2013).

All three of the above strategies are linked in their successful implementation to the active maintenance of social relationships and receiving a certain satisfaction from the interaction. The participants who describe these strategies actively maintain family and friendship relationships. However, they feel loneliness to varying degrees. But through their attitudes, they actively work to ensure that being lonely does not diminish their quality of life.

4. Conclusions

This article has dealt with the theme of loneliness in old age. Loneliness is observed from the perspective of older men and women, in terms of their perceived resources and strategies to cope with loneliness. Loneliness (not only) in old age is a serious problem interlinked with poorer health outcomes (Coyle & Dugan, 2012; K. J. Smith & Victor, 2019; Sunwoo, 2020) and lower life satisfaction (Bai et al., 2018); it is also associated with higher mortality (Holt-Lunstad et al., 2015).

Loneliness is an experience often understood as typical of old age. In the media space, old age is often associated with the image of a lonely widow watching television alone. Given women's more frequent experience of widowhood and their higher life expectancy, older women are more likely than men to live in a single-person household. Living in a single-person household poses a considerable challenge in terms of social relationships. Nevertheless, loneliness cannot be confused with a single-person household. A distinction should be made between loneliness—i.e., the subjective feeling of a lack of satisfactory social ties—and solitude, which can also be positive (Lay et al., 2019).

The shape of our social relationships is strongly gendered, with women typically having wider social networks and bein more often the ones who maintain relationships. At the same time, they are perceived to be at greater risk of loneliness in old age; studies disagree on whether older women really suffer from loneliness more often than men. It seems that differences in loneliness between men and women can be explained by structural factors, mainly marital status, age, and living arrangements (Aartsen & Jylhä, 2011; Victor et al., 2006). In particular, widowhood, which women are more likely to experience, is a risk factor leading to loneliness (Aartsen & Jylhä, 2011). A key finding in this article is the crucial effect of the partner pathway on the feeling of loneliness in old age. Although the intention has been to explore differences in loneliness between older men and women, gender turned out to play a surprisingly minor role in the participants' narratives. In fact, the experience of marriage or partnerships, or, conversely, single life without partner cohabitation, is the main dividing vector regarding feelings of loneliness. Participants explain their feelings of loneliness specifically through widowhood or the loss of a partner. Older adults without a partnership experience and without children differ in the shape of their social networks and their subjectively lower feelings of loneliness. However, they experience a significant risk of exclusion from social relations, given that their social networks include mostly low-intimacy relationships. Another strong source of loneliness is the feeling of unsatisfactory relationships with close family, especially children. Scarce and conflicting relationships with children not only lead to a strong sense of loneliness among our participants but also reduce the perceived quality of life, leading, in turn, to dissatisfaction with their life situation. When conflictual relationships are accompanied by health problems, they lead to significant exclusion from social relations, even as regards contact with caregivers.

In addition to the subjective perception of the sources of loneliness by older men and women, this article has focused on the strategies employed by older adults to counteract their feelings of loneliness. Based on the analysis of participants' narratives, they engage in three compensatory strategies: (a) actively seeking activities and encounters; (b) enjoying solitude; and/or (c) slowing down. In addition, an actor-centered approach to social relationships and agency in maintaining social relations appears to be crucial in promoting life satisfaction despite the loss of loved ones and health problems.

Conflict of Interests

The author declares no conflict of interests.

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Article

Siblings as Overlooked Potential for Care and Support Across Households and Borders

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Abstract

The growing numbers of Lithuanian families living across borders have prompted the reflection on family relations through the lens of the need for care and support of dependent children and elderly parents. The authors of this article expand the analysis of family lives in the migration context beyond child–parent relationships and shift the attention to understudied areas where sibling relationships are located. Sibling relationships are considered embedded within the family and the wider network of personal relationships. This article builds on the personal networks approach to examine the position of siblings in the personal networks of Lithuanian family members and draws on a toolbox of analytical concepts provided by the solidarity approach to disclose how sibling relationships could come into play in the case of need. The analysis of statistical data and two surveys carried out in Lithuania as part of the research project funded by the Research Council of Lithuania enabled the authors to uncover different layers of involvement of siblings in "doing families" across households and borders and to highlight the gendered patterns of support expectations towards siblings if/when the need of elderly or child care would arise in the migration context. The research data provide empirical evidence that sibling relationships could be affected by differentiated mobility experiences of family members and the re-definition of family roles due to newly emerging multi-local interactions. Cross-border family practices create new patterns of family relationships and an "intimate, but different" type of solidarity, common to Lithuanian residents with prior migration experience.

1. Introduction

Sibling relationships were rarely the centre of attention of scholars researching family lives. They are considered to have been "overlooked" (Riley, 1987), "unrecognised" kin (Kiraly et al., 2021), and "understudied" in both family and transnational studies (Baldassar & Brandhorst, 2021, p. 248). To date, a great part of the literature on care arrangements in transnational families has focused on nuclear family members, who remain in the country of origin, as the potential primary caregivers (Kordasiewicz et al., 2018). Recently, a strand of research studies has

emerged, turning the attention to siblings (Buchanan & Rotkirch, 2021) and close network members (Česnuitytė et al., 2017; Widmer et al., 2018), moving beyond the nuclear family unit to analyse the realm of family lives of multiple households.

This article aims to uncover the types of relationships among adult siblings and their (potential) involvement in caregiving roles across households and across borders to show that studies of kinsfolk should not be limited to the contribution of grandparents. Sisters and brothers, aunts and uncles represent a different generation and are uniquely influential and overlooked in the "latent kin

matrix" (Riley & Riley, 1993). Following Milardo's (2009) ideas on the contribution of aunts and uncles in the generativity of family relationships, siblings could be seen as teachers and mentors of their nieces and nephews, as intergenerational buffers, engaged in emotion work, or as providers of financial and practical support in case of need. The organisation of families across households and national borders reveals highly interdependent family configurations inclusive of adults, dependent children, and elderly persons in need of care. By omitting siblings from the studies of transnational families, we simplify how families are done (cf. Morgan, 1996, 2011) across borders.

The growing number of transnational families due to the high mobility of the Lithuanian population since the country's accession to the European Union in 2004 prompts one to reflect on the child and elderly care arrangements transcending national borders. The authors of this article expand the analysis of family lives in the migration context beyond child–parent relationships and shift the attention to understudied areas where sibling relationships are located.

As far as we know, to date, sibling relationships in transnational family life never have been at the centre of attention of family researchers in Lithuania. These relations were indirectly touched upon while analysing migrant families in various contexts, for example, when examining the factors of the formation of transnational families in post-communist society (Maslauskaitė & Stankūnienė, 2007), in analysing family practices (Juozeliūnienė & Seymour, 2020) and intergenerational relationships in transnational families (Budginaitė-Mačkinė, 2020; Juozeliūnienė et al., 2018). In these studies, the dependent child–parent relations, adult child–elderly parent relations and the involvement of grandparents in transnational caregiving practices were at the core of the analysis of care circulation in multiple households across borders. At the same time, the data from these studies shed light on siblings as potential care and support providers. Namely, it indicates that migration decisions and residence choices (both in the case of emigration and return migration) may be highly affected by the presence/absence of siblings in family configurations. Moreover, the geographical proximity/distance and presence/absence of siblings may influence the research participants' decisions to create kin-based family configurations or non-kin "family-like" communities in the case of need.

After briefly presenting the key migration and demographic trends in the subsequent part of the article to shed light on the country context, we present the theoretical considerations in migration and family scholarship relevant to studying sibling relationships across households and borders. The article builds on the personal networks approach (Milardo & Wellman, 1992; Widmer et al., 2018) to examine the position of siblings in the personal networks of Lithuanian family members and draws on a toolbox of analytical concepts provided by

the solidarity approach (Silverstein & Bengtson, 1997) to disclose how sibling relationships could come into play in the case of need. The article is based on the analysis of statistical data and two surveys carried out in Lithuania as part of the research project funded by the Research Council of Lithuania to answer the following questions: To what extent are siblings included in the networks of significant persons and how important they are in the terms of support for family members caring for dependent children and elderly parents in the context of migration? What types of relationships exist within and between generations in Lithuanian families, and how could sibling relationships be affected and re-organised by mobility practices?

2. Country Context: Migration Trends and Restructuring of Family Configurations

In this section, the authors place sibling relationships in the context of the restructuring of family configurations and relational dynamics of family lives in Lithuania due to the great flows of transnational migration and several decades of low fertility rates. Transnational family researchers consider that the availability and commitment of close network members play a crucial role in the organisation of cross-border care practices (Kordasiewicz et al., 2018). Thus, the role of siblings in the circulation of care could be highly affected by the changing numbers of horizontal family ties and the increasing geographical distance of family members.

Decreasing fertility rates in Lithuania lead to a decreasing number of horizontal family ties, among them, the number of siblings. According to data provided by Statistics Lithuania (2022b), the overall number of births has declined over the last twenty-five years by more than half, from 42,376 in 1994 (earliest available data point) to 23,330 in 2021. Academics note that the fertility rate has decreased among women in all age groups (Maslauskaitė, 2021). Similarly to other European countries (e.g., Lappegård, 2020), the family-related changes in Lithuania have been manifested through a lower level of intent to marry, decreasing marriage rates, childbearing postponement and a slight increase in childlessness (e.g., Gedvilaitė-Kordušienė et al., 2019). The representative surveys carried out in Lithuania disclose a multigenerational family structure with a higher number of vertical ties than horizontal ones: As a rule, Lithuanian residents have more mothers and fathers than brothers and sisters (e.g., Stankūnienė, 2009). For example, according to the data from the representative survey of the Lithuanian population carried out in 2018 as part of the Global Migration and Lithuanian Family: Family Practices, Circulation of Care and Return Strategies project, approximately one in three respondents (36.1%) aged 18 and older had no (alive) siblings (Budginaitė-Mačkinė, 2020). The researchers predict that the trend of verticalisation of the family structure of the adult population will become even more evident in the coming

decades, as a significant share of Lithuanian residents aged 18 and older (born during the Soviet times or in the early 90s) still have at least one sibling. The Lithuanian population, which currently can still rely on their siblings' support, in the future may face additional challenges.

Migration-induced restructuration of family configurations is considered another significant factor in the context of analysis of sibling relationships in the realm of family lives of multiple households. According to the data from the above-mentioned representative survey, two in three respondents (63.9%) had at least one sibling at the time of the survey: A significant share of them lived in a different part of the country than their sisters (34.4%) and brothers (39.3%); furthermore, 12.6% of the survey participants indicated that their sisters live abroad and 9.3% of the respondents' brothers moved abroad. These data show that approximately one in three siblings live far from each other due to mobility within the country and one in ten Lithuanian residents are separated by national borders from at least one of their siblings due to international mobility. Such a noticeable share of siblings living abroad is related to the high mobility rates (Eurostat, 2022; Statistics Lithuania, 2022a). Lithuania's population has decreased by 679.2 thousand people since 1990 due to emigration, which constitutes about 18.4% of the population (EMN, 2022). This prompts the reflection on the role of siblings in families living across households and national borders.

3. Theoretical Considerations

Some transnational family researchers focus on sibling relationships due to the significant role they play as potential primary caregivers alongside other family members who remain in the country of origin (Kordasiewicz et al., 2018). Siblings are "invariably caught up" in the various forms of mobility and both transnationally mobile siblings and siblings who continue to live in the country of origin are influenced by the roles each other performs in the family (Baldassar & Brandhorst, 2021). The research studies show that sibling relationships are embedded within the close family and the wider network of personal relationships (Szydlik, 2008). The decisions involving siblings in caregiving roles greatly depend on the geographical distance of the residence, even within a country (Kordasiewicz et al., 2018). Furthermore, the geographical configuration of non-resident family networks and relationship dynamics with non-resident families (incl. siblings) may influence migration decisions (Thomas & Dommermuth, 2021). To shed light on the importance of sibling ties within and across borders and explore how sibling relations can contribute to the organisation of care and support in families under migration, the authors of this article combine personal network analysis with the intergenerational solidarity approach.

To examine the position of siblings in the wider network of personal relationships and support expectations directed at them in the context of migration, we rely on the concept of personal networks (Milardo & Wellman, 1992) and theoretical insights from a configurational analysis perspective (Widmer & Jallinoja, 2008). Personal networks are considered to consist of individuals whom the individual deems important and close (Milardo & Wellman, 1992) for social, emotional, or symbolic reasons (Widmer et al., 2018). These concepts are used to analyse the structure of personal networks, the position of siblings in them, and expectations of support from siblings and other significant persons in the case of child and elderly care. All types of relationships are regarded as familial resources to be invoked by families experiencing migration.

The personal networks analysis is combined with the solidarity approach (Bengtson, 2001; Silverstein & Bengtson, 1997), extended by the analysis of kin relations (Nauck, 2015). This approach enables the authors of the article to disclose how the relationships within generations (among siblings) alongside relations between generations (adult children–parents) come into play in transnational families. The analysis is conducted using the dimensions of solidarity as defined by Bengtson and colleagues, including *associational solidarity* (expressed in terms of the frequency of contact and its nature), *emotional solidarity* (characterised by the intensity of emotional closeness/distance), *consensus solidarity* (degree of similarity in opinions and beliefs between and within generations), *structural solidarity* (expressed in terms of geographic proximity/distance and the number of vertical and horizontal ties), and *functional solidarity* (referring to the flows of practical, financial and emotional support). The latter two dimensions are of particular interest in this article. Given the complexity of family life, these dimensions are analysed together and used to derive a typology of solidarity between and within generations (Silverstein & Bengtson, 1997).

When analysing the personal networks and solidarity within and between generations, special attention is paid to the gender dimension. Previous research indicates that women tend to maintain more ties with family, kin and other individuals included in their personal networks (Rainie et al., 2012). Gender can be linked to the expression of filial norms and the readiness of individuals to help their family members (Haberkern & Szydlik, 2010), as well as to types of intergenerational solidarity and expectations of support from personal networks in the context of migration. Prior research focusing on the Lithuanian case has revealed the importance of women (particularly mothers) in intergenerational relations (Juozeliūnienė & Budginaitė, 2016; Kanopienė, 2014; Tureikytė, 2015) and different types of assistance to families with migration experience, depending on the gender of the family member remaining in Lithuania (Juozeliūnienė et al., 2018). In this article, we compare the support expectations of the Lithuanian population towards their sisters and their brothers and examine to what extent the relationship patterns within and across generations are gendered.

This article contributes to both family and personal networks studies, as well as scholarship on child and elderly care arrangements transcending national borders. The combination of the analysis of personal networks with a solidarity approach allows the authors to reveal the significance of siblings in personal networks and determine the relationship patterns based on expectations of support that exist towards siblings in the context of care for elderly parents and dependent children. It contributes to the development of migrant family research in Lithuania and complements typological studies of intergenerational solidarity in the context of migration in Eastern and Central Europe.

4. Data and Methods

The article draws from an analysis of available statistics (EMN, 2022; Eurostat, 2022; Statistics Lithuania, 2022a, 2022b) and an analysis of data from two surveys carried out in Lithuania. The first survey (Migration and Family Processes: Representative Study) is an Omnibus-type representative survey of the Lithuanian population aged 18 and older, conducted in June–July 2018 (N = 1005). The second survey (Migration and Family Processes: Quota Study) is a quota survey of persons aged 18 and older with direct experience of international migration (defined as living abroad for a period of 6 months or longer since 2004) conducted in August 2018 (N = 406) in Lithuania targeting two groups of respondents: Lithuanian residents who at the time of the departure had dependent children (up to 18 years old) residing in Lithuania (N = 306) and Lithuanian residents who at the time of departure had parents requiring care in Lithuania (N = 100). The respondents with direct experience of international migration resided in Lithuania at the time of the survey. The questions used to collect data on networks of significant persons and intergenerational solidarity were identical in both surveys. Both surveys were implemented as part of the project Global Migration and Lithuanian Family: Family Practices, Circulation of Care and Return Strategies (led by prof. Irena Juozeliūnienė) supported by the Lithuanian Research Council and to date remain one of the most extensive data sources in Lithuania to study family and personal relationships within and across national borders. The analysis of the above-mentioned data sources was carried out while implementing a postdoctoral research project (No. 09.3.3-LMT-K-712-23-0155).

To identify the extent to which siblings are included in the networks of significant persons and their importance in the terms of support for family members with child care and care for elderly parents, we selected questions from the standardised questionnaires related to these aspects. The respondents of each survey were first asked to list persons significant to them over the last 12 months (in a positive or negative sense); later they were asked about the demographic characteristics of every listed important person (gender, age, place of

residence) and relationship type. In addition, the participants of both surveys had to answer two specific questions about support expectations. The respondents, who have dependent children, were asked who from the list of persons significant to them could help them with child care if/when needed. The respondents, who have at least one parent alive, were asked who from the list of significant persons could help them with care for elderly parent(s), if/when the need for such care arises. Descriptive and inferential statistical methods were used to analyse the networks of significant individuals (in terms of their characteristics and support expectations) and the factors explaining the variations between them. Analysis was conducted using the software package SPSS.

To examine the relationships between siblings, we selected a series of questions about the nature of their relationship with their sister and brother, if existent. If there was more than one sibling, the questions were asked about the oldest sister/brother. In addition, to derive a relationship typology with the family of origin (Silverstein & Bengtson, 1997), we included identical questions about the nature of their mother and father, if alive. Respondents were asked to rate their respective relationships related to the five above-mentioned dimensions of solidarity based on the following indicators: the geographical proximity to this person, the frequency of contact, emotional closeness, the similarity of opinions and beliefs, and practical support provided to and received from this person. These indicators were dichotomised and entered into a series of latent class analyses using Mplus software to derive a relationship typology, without a predefined number of classes. We started with the model with only one class and continued increasing it to determine if the set of available model diagnostics (such as L^2, BIC, AIC, and entropy values) point to a certain number of classes to retain. L^2 indicates the goodness of fit, taking into account p value (when p value is higher than .05, it is recommended to choose the model which has one less class). The goodness of fit is also assessed by using several information criteria, such as the Bayesian information criterion (BIC) and Akaike information criterion (AIC), each of which is designed to favour models with smaller numbers of parameters (and penalise models with larger numbers of parameters): lower values indicate a better fit; if lowest BIC and AIC value is identified in different models, we choose by BIC value. An entropy value close to 1 indicates clear delineation to classes, 0.8 value is considered suitable for choosing the model (Celeux & Soromenho, 1996). The model diagnostics and the information on the detected latent groups are provided in Tables 1–4 included in the Supplementary File. Following the methodological guidance of the authors adhering to the solidarity approach (Guo et al., 2012; Silverstein & Bengtson, 1997), the latent class analysis included only the information about the relationships with siblings and parents who do not reside in the same household as the respondent. After the intergenerational relationships

were classified into a typology of intergenerational solidarity using latent class analysis, inferential statistical methods were used to analyse the relationships between sociodemographic and family traits, migration experience, and the family relationship types identified. Supplementary questions were used to determine the communication content (i.e., talking about child-rearing; talking about important personal matters) and to identify the designated child and elderly care providers while respondents having direct migration experience lived abroad. Descriptive and inferential statistical methods were applied using the software package SPSS to analyse the communication content and the factors explaining the variations between them.

5. Results

5.1. The Significance of Siblings in Personal Networks

Following Szydlik (2008), sibling relationships are considered to be embedded within the family and the wider network of personal relationships. In this part of the article, we aim to analyse, firstly, the place attributed to siblings in the networks of significant persons of the Lithuanian population; secondly, to examine to what extent Lithuanian residents would count on their sisters and/or brothers, if/when the need to care for underage child(ren) and/or elderly parent(s) would arise. The siblings' place in the personal networks will be compared to the place attributed to other significant persons, including both kin and non-blood-related ties.

The analysis of personal networks reveals that they are dominated by close family ties (69.2%): The mem-

bers of the family of procreation (spouse/partner, children; 39.2%) and family of origin (30.0%, namely 10.5% mothers, 7.4% sisters, 6.6% fathers, 5.4% brothers) are most likely to be considered significant persons. Meanwhile more distant kin (grandparents, grandchildren, aunts/uncles, nieces/nephews, in-laws, other kin related by blood or marriage) and non-blood-related individuals (friends, acquaintances, neighbours, etc.) represent respectively 19.4% and 11.5% of the personal networks. Compared to the non-kin, siblings (12.8%) seem to be similarly likely to be considered significant persons by the respondents. Regardless of the "ascribed rather than voluntary" nature of sibling relationships, they can be more enduring (cf. Cicirelli, 1995) and one may potentially expect a higher level of support expectations directed towards siblings in comparison to other non-kin relations.

When asked whom they could rely on, if/when the need arises to take care of elderly parent(s) or dependent children (e.g., in the context of migration), survey respondents answered differently depending on the type of care needed. The analysis revealed that Lithuanian residents consider themselves most likely to rely on members of the family of procreation (51.7%) if/when their elderly parent(s) require(s) care (see Figure 1). Meanwhile, if/when the need for support with child care occurs, the Lithuanian population would mainly count on their family of origin (48.1%; see Figure 2).

Looking specifically at support expectations directed towards siblings, we can notice that siblings are more likely to be considered as potentially able to assume or share responsibilities for parental care (28.1%) compared to child care (12.8%). If/when the need arises to take care of elderly parent(s) (see Figure 1), siblings
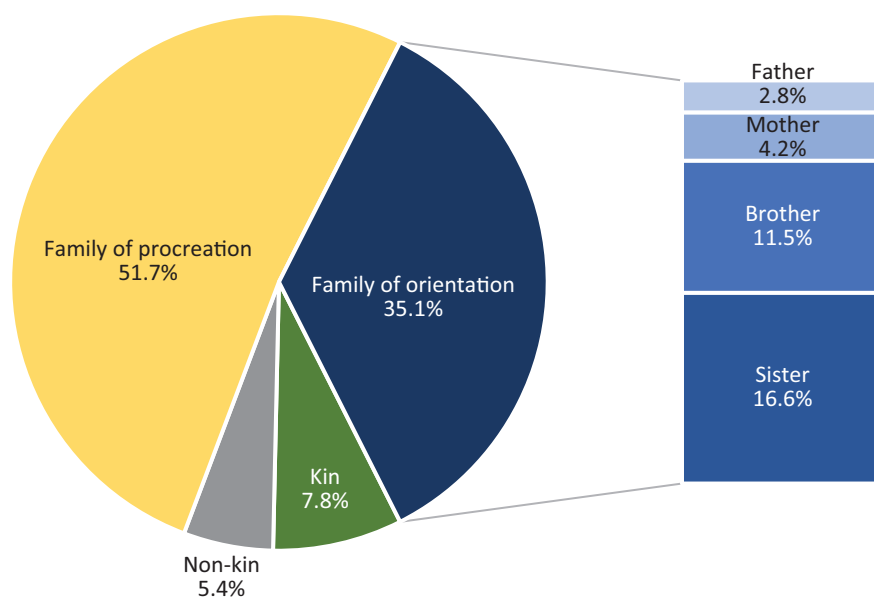
Figure 1. Significant persons that could provide support with care for elderly parents. Source: Data derived from the 2018 representative survey Migration and Family Processes: Representative Study (*N* = 1005) and complemented with information by 910 respondents (*N*/*N* = 95); there were about 1092 significant persons who could provide such care (27.9% of all significant persons mentioned).
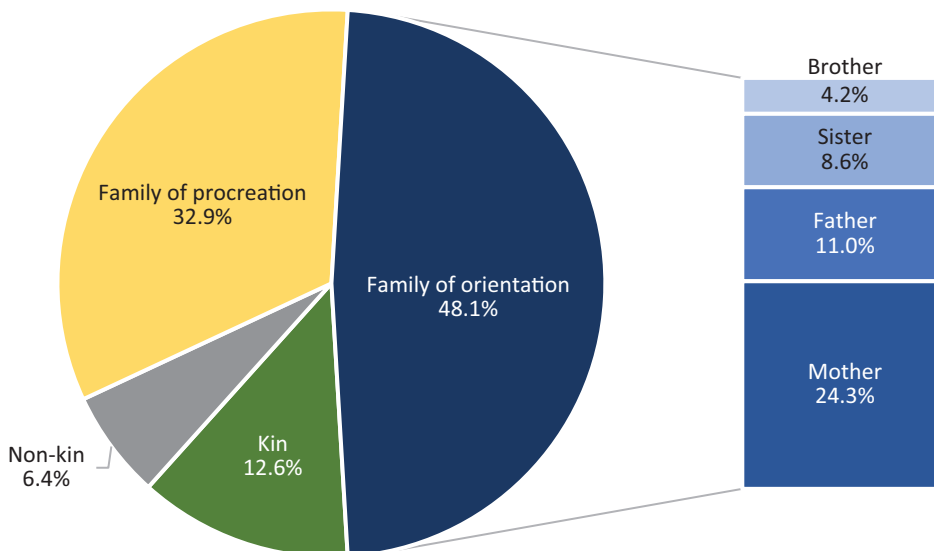
Figure 2. Significant persons that could provide support with care for dependent child(ren). Source: Data derived from the 2018 representative survey Migration and Family Processes: Representative Study (*N* = 1005) and complemented with information by 977 respondents (*N*/*N* = 28); there were about 918 significant persons who could provide such care (23.5% of all significant persons mentioned).

(27.9%) emerge as the most likely care providers from the family of origin, even if in a few cases respondents would still hope to rely on one of the elderly parents to provide support to the other (4.2% indicated that they would count on their elderly mother for support; 2.8% indicated that they would count on their elderly father). The support expectations seem to be similarly gendered in both horizontal and vertical family lines, even if the differences are not particularly high.

In the case of support with child care (see Figure 2), respondents were twice as likely to count on their mother (child's grandmother; 24.3%) compared to their siblings (child's aunts and uncles; 12.8%) as potential care providers. Nevertheless, siblings seem to be almost as likely to be considered as potential support providers as the respondent's father (child's grandfather; 11.0%) and other kin (12.6%). It is also noteworthy that when choosing who could potentially help to take care of their dependent children, Lithuanian residents more often named their sister (child's aunt; 8.6%) than their brother (child's uncle; 4.2%). This reveals that overall the support expectations are more often directed to women in the horizontal family line (as well as in the vertical one) and indicates that support expectations can be potentially gendered in the migration context as well.

When compared to non-kin (friends, acquaintances, etc.), siblings emerge as more important child and elderly care providers than other kin relations beyond the nuclear family and non-blood-relations (see Figures 1 and 2). Having determined the position of siblings in the networks of significant persons and the support expectations directed at them, in the next section we analyse the solidarity dimensions through which siblings' potential for care and support may be expressed.

5.2. Siblings' Potential for Care and Support Through the Lens of Solidarity Dimensions

By exploring the realm of sibling relationships as an overlooked potential for care and support in cases of need, we aimed to better understand the relationships within and between generations, and how sibling relationships could be affected and re-organised by mobility practices. To do so, we draw on a toolbox of analytical concepts provided by the solidarity approach (Bengtson, 2001; Silverstein & Bengtson, 1997).

First, the analysis of solidarity patterns within and between generations allowed us to determine siblings' potential for care and support in the field of familial relationships and uncover key layers of siblings' involvement in doing families across borders.

The data show that generally, the Lithuanian population feels close to their family of origin, including siblings (particularly sisters) even if/when they live in another part of the country or abroad. Latent class analysis yielded four patterns indicating different types of solidarity, which were also common in the wider literature on solidarity across and within generations (e.g., Nauck, 2015). The relationships characterised by high solidarity in all dimensions were classified as "tight-knit" (30.3% of relations with the family of origin were attributed to this type). A pattern of high emotional closeness and consensus, as well as frequent communication, despite the low level of practical support due to the geographical distance, was defined as "intimate, but geographically distant" (39.1%; i.e., the most common relationship type in Lithuania). The relationship pattern characterised by geographical proximity and a high level of mutual support, but lacking both emotional closeness and similarity of

opinions, was labelled as "obligatory" solidarity (12.6%). Low scores on all solidarity dimensions were indicative of a "detached" relationship type (18.0%). Overall, "intimate, but geographically distant" and "tight-knit" relationships with the family of origin are the most common types of relationships in Lithuania, while such relationship types as "detached" and "obligatory" proved to be less prevalent.

In comparing the solidarity types within and between generations (see Figure 3), we can see that the patterns, according to which the relationships among siblings are structured, differ from relationship patterns with parents. Even if emotional closeness and similarity of opinions continue to be particularly characteristic of sibling ties, geographical distance is an important factor in structuring these relationships. Having a closer look at the sibling relationship patterns defined by close geographical proximity ("tight-knit" and "obligatory"), we can observe that "tight-knit" relationships are much less widespread among siblings (24.2% of sister–sister dyads, 17.8% of brother–brother dyads, 15.6% of brother–sister dyads, and 15.0% of sister–brother dyads) compared to parents (58.2% of daughter–mother dyads, 40.7% of son–mother dyads, 37.7% of daughter–father dyads, and 34.8% of son–father dyads). Nevertheless, such a pattern of relationships (defined by high solidarity on all dimensions) is more common than "obligatory" relationships.

Looking at the two remaining relationship patterns defined by geographical distance (with siblings living in another part of the country or abroad), it is evident that in some cases sibling relationships weaken and break loose at a distance (28.9% of brother–sister dyads, 26.3% of relations among brothers, 25.1% of sister-brother dyads and 16.9% of relations among sisters were defined

as "detached"). This happens less often in the case of relationships with mothers (6.0% of daughter–mother dyads, 7.3% of son–mother dyads), but almost as often with fathers when living at a distance from them (24.6% of daughter–father dyads and 19.6% of son-father dyads are classified as "detached").

Last, but not least, regardless of the significant share of "detached" relationships between the siblings, most of the sibling relationships at a distance fall into the category of "intimate, but geographically distant" (49.2–52.9% of sibling dyads are attributed to this relationship type; see Figure 3) and are defined by continuous communication, close emotional bonds, and similarity of opinions, regardless of the low level of practical support among them. It is noteworthy that the prevalence of this relationship pattern appears to be slightly more acute among the siblings in younger cohorts (18–29 years old), who do not have (yet) a spouse/partner and/or children. Other sociodemographic characteristics (education, occupational status, and respondent's gender), however, do not seem to affect the distribution of relationship types among siblings in a statistically significant way, as the results of inferential statistics analysis indicate (results not shown here; for more details on the results of inferential statistics analysis see Budginaitė-Mačkinė, 2020).

The distribution of relationship types between Lithuanian residents and their siblings is at least to some extent gendered (see Figure 3), even if differences remain relatively small. Namely, a larger share of relationships among sisters (24.2%) can be defined as "tight-knit" (compared to 17.8% among brothers, 15.6% of relationships between male respondents and their sisters, and 15.0% of relationships between female respondents and
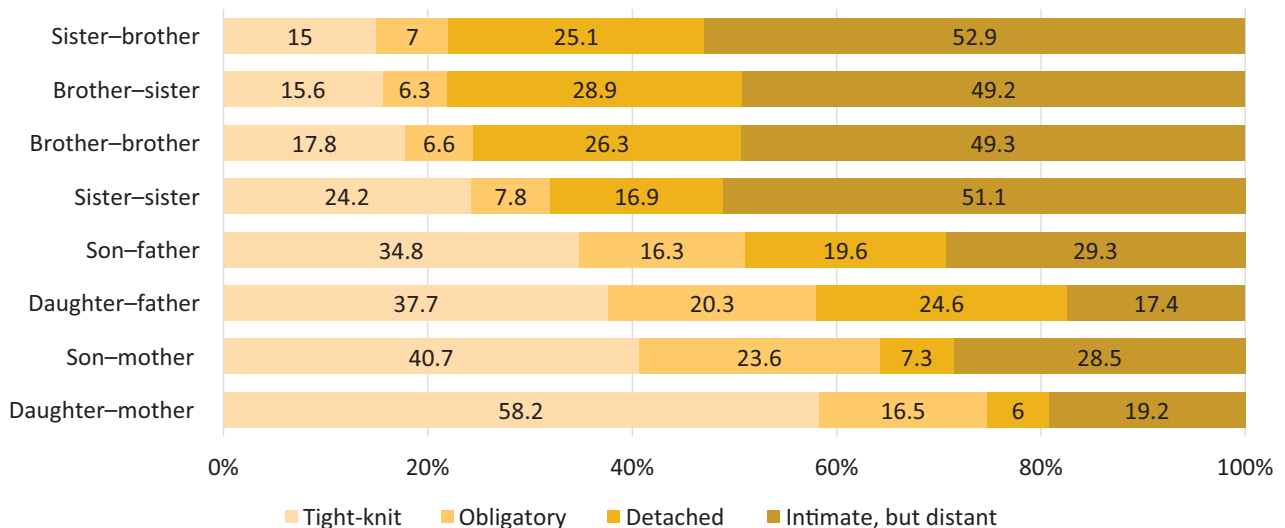
Figure 3. Solidarity within and between generations in Lithuania. Notes: The typology of relationships developed based on the information about 719 sibling dyads and 602 adult child–parent dyads (1322 dyads in total); the respondent is presented as the first part of the dyad (for example, the sister–brother dyad indicates that it refers to a relationship between the female respondent and her brother). Source: Data derived from the 2018 representative survey Migration and Family Processes: Representative Study.

their sisters). At the same time, the "detached" relationship type is less prevalent among sisters (16.9%) than other sibling dyads (25.1% to 28.9%). The gendered relationship patterns become even more evident if the typological relationship analysis is complemented with further analysis of separate solidarity dimensions. The examination of the communication content reveals that even if the Lithuanian population seems to be close with both sisters and brothers, sisters are much more likely to become Lithuanian residents' confidants on important personal matters (84.8% of respondents discuss such issues with sisters and 59.2% with brothers) and child-rearing issues (individuals who have dependent children are more likely to talk with sisters than brothers: 65.8% and 51.7% respectively). This highlights the particular importance of sisters and confirms that relationship patterns between siblings may be gendered.

Second, research reveals that sibling relationships could be affected by the differentiation of mobility experiences among family members and the re-definition of family roles due to the newly emerging multi-local interactions. Namely, different life-trajectories of mobile Lithuanians and their non-migrant siblings give new meanings to sibling relationships while keeping them "knitted together" (Coe & Wu, 2016) in a way non-migrant siblings fulfil care roles instead of mobile ones.

Looking specifically at transnational care arrangements, the analysis of quota survey data shows that siblings may act as care providers for both underage children and elderly parents remaining in Lithuania. It is especially true for the organisation of elderly parents' care. The analysis of elderly parents' care arrangements in Lithuania upon the respondent's departure

abroad showed that the largest share of the designated caregivers belonged to siblings (31.9%), compared to maternal/paternal relatives (7.7%) and parents' spouses/partners (6.7%). The prevalence of siblings over other relatives or parents' spouses shows that (adult) children are the main responsible and main resource for care and support towards older parents. Responsibility for providing the child(ren) remaining in Lithuania with living quarters quite often fell on the shoulders of the family of orientation (including siblings) (44.9%) in transnational child-care arrangements (6.2%; Juozeliūnienė et al., 2020).

Third, the data from the quota survey of persons with direct experience of international migration (and transnational family life) give empirical evidence that newly emerging transnational practices create new patterns of family relationships and types of solidarity.

To classify the complex relationships of mobile Lithuanians with their family of origin, we used latent class analysis, which yielded four types of relationship patterns. Three out of four relationship types correspond to traditional types of solidarity observed in other typological studies: namely, "tight-knit", "close, but geographically distant," and "detached" relationships (Silverstein & Bengtson, 1997; the main characteristics of these relationship types were presented above; see Figure 4).

The analysis of the relationships between respondents, who have been previously separated by a considerable geographical distance and at the time of the survey resided in Lithuania, points to the emergence of an "intimate, but different" relationship type as a new solidarity type induced by migration. Such relationships are characterised by all the dimensions of solidarity among and between generations except for similarity of

Dyad	Tight-knit	Intimate, but different	Detached	Intimate, but distant
Brother–brother	24.1	45.6	26.6	3.8
Sister–brother	35.1	42.1	15.4	7.4
Brother–sister	42.6	36.9	14	6.5
Sister–sister	47.7	42.7	4.3	5.3
Daughter–father	51.7	10	25	13.3
Son–father	58.1	14	10.5	17.4
Daughter–mother	64.8	13.6	5.7	15.9
Son–mother	65	9.8	5.7	19.5
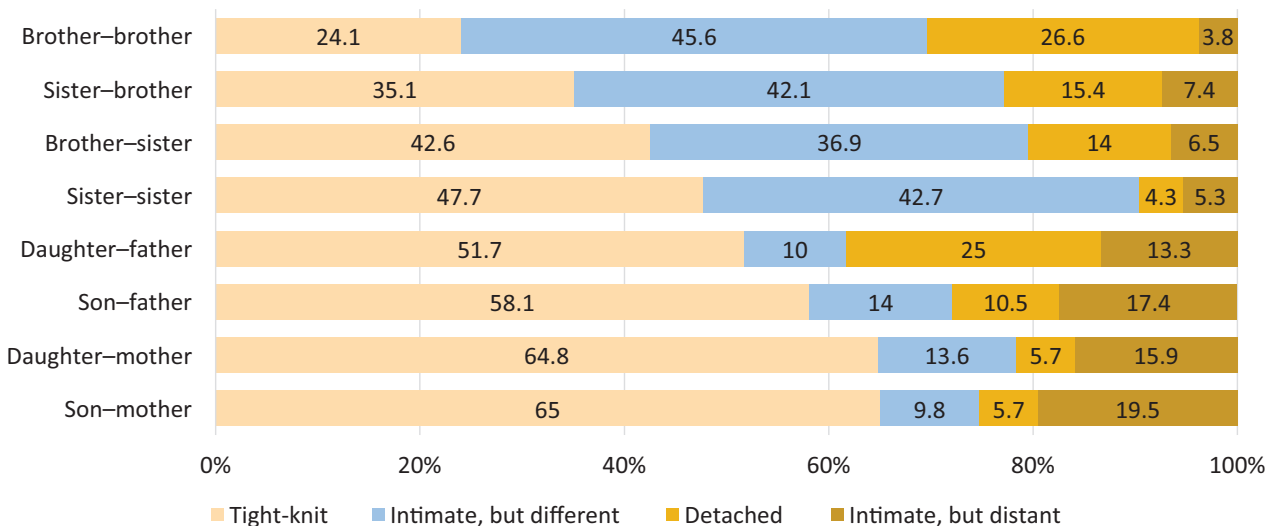
Figure 4. Solidarity within and between generations in Lithuanian migrant families. Notes: The typology of relationships developed based on the information about 227 sibling dyads and 357 adult child–parent dyads (584 dyads in total); the respondent is presented as the first part of the dyad (for example, the sister–brother dyad indicates that it refers to the relationship between the female respondent and her brother). Source: Data derived from the 2018 quota survey Migration and Family Processes: Quota Study of the Lithuanian population with direct migration experience.

opinion. This relationship type can be situated between "tight-knit'' and "obligatory" relationships: It shares most of the characteristics with these two relationship types, but it differs from "tight-knit" relationships by a low level of similarity of opinions and differs from "obligatory" relationships by high emotional closeness. Since emotional closeness is considered to be an important basis of relationship quality, the new solidarity type is considered to be a modified version of "tight-knit" relationships and was named "intimate, but different". This relationship type is widespread in all sibling dyads (see Figure 4).

The above-mentioned "intimate, but different" relationship type was not found in the general Lithuanian population and is typical only of Lithuanians with direct experience of migration. This indicates the formation of a new family solidarity type in the context of migration, especially in relationships with sisters and brothers (see Figure 4). The relationship between Lithuanians who previously lived abroad and their siblings (and parents) who remained in Lithuania continue to be defined by emotional closeness, but at the same time differences in opinions on important matters start to become more evident. This points to both changes in attitudes while living abroad and a higher likelihood of mobility among the Lithuanian population who do not share similar opinions with their siblings (and parents), even before migration. It is important to note that, regardless of the difference of opinions, Lithuanian residents who have prior migration experience feel emotionally close to their siblings, which is an important aspect when it comes to determining support potential in the future in case of need.

6. Conclusion

The growing number of Lithuanian families living across borders has prompted the reflection on family relations through the lens of the need for care and support of dependent children and elderly parents, with a particular focus on sibling relationships as overlooked and understudied kin. The analysis of the empirical data presented in this article enabled the authors to disclose sibling relationships as familial resources to be invoked by families experiencing migration as well as to test the solidarity approach to analyse the ways these relationships come into play in transnational families.

The analysis of personal networks of Lithuanian residents, in which sibling relations and other ties are embedded, reveals that siblings emerge as more important care providers than other kin relations beyond the nuclear family and non-blood-relations. Overall, a considerable share of the population sees siblings as likely support providers when it comes to the care of elderly parents and, to a smaller extent, child care. Such patterns of support expectations indicate that Lithuanian residents who have at least one sibling could count on them in the context of migration, particularly if the need for care for elderly parents arises. Similarly, they could potentially rely on them if/when exposed to various ongoing polit-

ical, economic, and public health-related uncertainties that may increase the need for additional support both within and across borders.

At the same time, we may expect that the siblings' potential for care and support across households and borders will decrease over time in quantitative terms. Considering the ongoing demographic changes in Lithuanian society and the decreasing number of horizontal ties, future generations may find themselves more strained with care responsibilities and have even fewer blood relations to rely on, especially in the case of elderly parents' care. In other words, the Lithuanian population, which currently can still rely on their siblings' support, in the future may face challenges due to the decreasing numbers of horizontal family ties, among them, the number of siblings, as well as migration-induced increasing geographical distance of siblings' residence. This, in turn, may encourage future generations to reconsider their migration decisions altogether, increase the flow of return migration due to the emerging needs of care of elderly parents, or increase the emigration rate of the elderly population joining their single child abroad. The lack of siblings may lead to "intergenerational care slotting" (cf. Leinaweaver, 2010) in the future, involving a higher number of non-kin in the multidirectional care exchanges following one's emigration.

The authors of this article uncover different layers of involvement of siblings in doing families across households and borders. The data indicate that intimate relations with siblings are maintained even when living far from each other and geographical distance does not necessarily imply emotional distance or detachment. The high prevalence of close relationships even at a distance (as demonstrated by the high share of "intimate, but geographically distant" relationship type) generally shows that the support between siblings living at a distance may be potentially activated in the case of need, be it by getting involved in practical care or other types of support (emotional, financial) from a distance. Furthermore, even at a distance, siblings (particularly sisters) may be an important source of support and advice through active communication between siblings on child-rearing practices.

The analysis of both personal networks and solidarity within generations points to the gendered patterns of support expectations towards siblings, as higher support expectations from the Lithuanian population towards their sisters in comparison to their brothers indicate. Similarly, solidarity among sisters tends to be slightly higher compared to the other sibling dyads, particularly on some solidarity dimensions. Awareness that non-mobile siblings (sisters more so than brothers) could step in and help to fulfil care roles may become a factor facilitating decisions to migrate and lead (at least for a certain time) a transnational family life.

Finally, the research data give empirical evidence that the siblings' potential for care and support may also change over time in terms of relationship quality.

The analysis of the patterns of intragenerational solidarity reveals that sibling relationships could be affected by the differentiation of mobility experiences among family members and the re-definition of family roles due to the newly emerging multi-local interactions. The direct experience of international migration (and transnational family life) creates new patterns of family relationships and a new type of solidarity, namely, "intimate, but different". Such relationships are characterised by all the dimensions of solidarity except for the similarity of opinions. Opinions on important matters held by the mobile population start to differ from their siblings remaining in Lithuania, but the relationships remain emotionally close. This indicates that relations do not weaken, only get reorganised adjusting to the mobile family life. We may assume that the diversification of attitudes among siblings connects with different engagement in transnational practices and diverse social and cultural contexts of the countries of destination. Taking into consideration that thinking and doing are intertwined in practice (Smart, 2007, p. 38), migration-induced differences in the conceptualisation of living family lives could lead to contradictory and/or ambivalent ways of understanding familial commitments and caring practices. However, cross-border living experiences allow the maintaining of close emotional bonds between siblings and give reason to believe that different ways in which relationships exist in one's imagination could be negotiated and new scripts of siblings' commitment-based relationships can emerge due to migration experience in the family.

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Conflict of Interests

The authors declare no conflict of interest.

Supplementary Material

Supplementary material for this article is available online in the format provided by the authors (unedited).

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Article

The Intergenerational Representation of Old Age in the Transition to Frailty: An Empirical Analysis in Italy

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Abstract

The results presented here are part of the outcome of a research project titled Redesign—Frail Elderly, Intergenerational Solidarity and Age-Friendly Communities (https://redesignanziani.com) funded by Fondazione Cariplo and coordinated by the Università Cattolica del Sacro Cuore in Milan, in collaboration with Università degli studi di Verona and Università degli studi del Molise (2019–2022). The research aims to co-acquire knowledge of the transition to old age in vulnerable situations, to develop and implement new community networks of care, and thus promote health and well-being, active ageing, and intergenerational solidarity in eight Italian municipalities. The analysis of the dyadic interviews, conducted with the NVivo software, will provide the image of ageing and old age emerging from an intergenerational dialogue. By analysing results, it will therefore be possible to identify some specific types of representation of old age in relation to the dyad, the stressful events that occurred to the interviewees and in relation to the ways of living the transition. The representation of old age seems closely connected with the quality and intensity of relationships, the environment of associative and local life that the interviewees relate to, and the stressful events that have recently occurred to them.

Keywords

ageing; dyadic interviews; intergenerational solidarity; qualitative research; representation of old age

Issue

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1. Introduction

In both individual and collective representations, the transition to old age tends to be gradually postponed. This is, to some extent, the outcome of a twofold process: On the one hand, life expectancy gradually increases, providing a long time of relative well-being; on the other hand, there is a prevailing social representation labelling old age as an undesirable condition and going as far as adopting discriminatory attitudes towards older people (ageism).

In contemporary societies, where the myth of youth and an efficient body is firmly established, the elderly are perceived as slow, non-capable, inefficient, and lacking. As Butler et al. (1998) observed, the elderly condition is almost denied by a youth-oriented society, with a form of contempt of the elderly image being prevalent in mass media.

Conversely, the number of citizens in need of care has increased, along with the number of resources to be allocated to the frail elderly population or those with chronic diseases, which represent a burden for individuals and the system.

However, social, language, working, and managerial practices are soaked with the struggle to accept "the burden of old age." Just think about the difficulty in being hired after the age of 45, about abuses in nursing homes, about commonly used metaphors in the Italian language such as *rottamare gli anziani* ("scrapping the elderly"), or about the fact that one in six people over 60 suffers fraud, financial, physical, and/or psychological abuse.

The recent Covid-19 pandemic has brought the focus back on the elderly, who are the most vulnerable to the negative outcomes of the virus (Pilotto et al., 2022). An Italian study conducted by Diversity Lab and the University of Pavia showed that, between January and

April 2020, media coverage of the five areas of diversity (generations, gender, disability, ethnicity, LGBT+) decreased dramatically, except for people over 60.

The narrative, however, focused on the death toll and access to intensive care, with special reference to numbers and statistics. Very little was said, in fact, about how many people over 70 live and perceive this phase of their life.

This article aims to give voice to the elderly in order to understand their representations of old age and how they are coping with the transition to this stage of their life.

People experience a slow and gradual transition from the middle phase of their life, which is full of engagements, work activities, and family responsibilities, to a phase in which time is freed up and used to engage in relationships and activities that are impossible for them to engage in up until that moment. Then comes the last phase, in which energies are low and individuals tend to adopt a more conservative approach, aimed at undertaking activities that are considered essential, with a natural reduction of the reference network.

For the vast majority, the ageing process is dotted by critical events—or stressors—that expose the elderly to the risk of frailty or put them in a condition of full-blown frailty. Research helps us identify some of the events that we have called stressors and that pertain to three macro areas: (a) clinical; (b) socio-relational; and (c) socio-economic. These are dramatic events of different magnitude, like, for instance, illness, widowhood, and the loss of one's house, which are all factors that force the elderly and their family networks to rearrange their lives, on a practical level and also after acknowledging, perhaps for the first time, the need to support the elderly.

These critical events are usually the opportunity for the latter to become aware of time passing and of their impending frailty.

This transition puts the individuals' agency to the test, changes their role within their families and social networks, and forces them to reorganise their networks, concerning which their material, psychological, or relational resources may determine more or less effective outcomes.

In most cases, this shift in roles is still taking place within the family, where all generations perform an important task in accompanying, supporting, and—to some extent—easing or hindering the transition.

In this article, we will try to illustrate how those who are ageing and those close to them perceive what is happening and talk about it, what they are concerned about, and what resources they provide to try and respond to the challenges of ageing (Bramanti & Nanetti, 2022).

What happens when the elderly begin to experience the first symptoms of frailty that no longer allow them to live a fully independent life? What words do the elderly and those close to them use to describe what is happening? How does the quality of the dyadic bond enable both the elderly and their reference person to cope with the present and think about the future, while identifying a specific task for this phase of life?

Have the stressors experienced by the elderly interviewed had an impact on how they perceive ageing and cope with the transition to old age? And in what way?

62 dyadic interviews—conducted between February 2020 and June 2021, in different areas of Northern Italy, with an over-75 elderly person and a reference emergency person indicated by him/her—will be analysed.

2. Theoretical Framework

This exploration builds on several previous investigations that have highlighted how the transition to old age may, to some extent, be influenced by the perception that the elderly and their closest networks have of the meaning of ageing (Bramanti & Nanetti, 2022; Foster & Walker, 2021; Grenier, 2007, 2020; Mendoza-Nunez et al., 2018).

The chance of effectively going through critical events is affected by a variety of factors, such as the relevance of the stressor, the presence of an extended family and primary network, the quality of the dyadic bond, the significance attached to ageing at personal, family, and social lvel, and the availability of local services (Monteduro et al., 2021).

The first observation, in common with much of the literature so far, is that frailty is multidimensional (Marcon et al., 2010).

The studies that were conducted have investigated the bio-psycho-social indicators (Gobbens et al., 2010) that are responsible for the individual's increasing frailty and social powerlessness (Giarelli, 2019). This perspective follows a multidimensional logic as to the determinants of the state of frailty, which includes physiological, functional, psychological, relational, economic, cultural, spiritual, and environmental aspects. Thus, frailty is not limited to biological and psychological factors alone, which are inherent in everyone, but stretches to his/her social constructs (Grenier, 2012; Lowry, 2022), as well as to interpersonal relationships and social capital, which are vital resources for the individual (Bramanti et al., 2014).

The perceptions of old age in society also depend on family culture and the environment in which the elderly live. Living in an ageing-friendly environment helps fight discrimination and undermine social values and beliefs, which may lead to a jaundiced view of the phases of life. Conversely, some studies show that ageism interlaces with other discriminatory attitudes, including those based on race or culture, thus determining negative outcomes. However, how older members of different cultural groups experience and acknowledge age discrimination and react to such stereotypes may also depend on their culture. Research conducted in Canada on how ageing is perceived among groups of older people from different cultures of origin—Chinese, Arab, and South Asian Indian—highlighted that older people share relatively

positive perceptions of ageing, and preserve their physical and psychological well-being, in part through their engagement in their family and community. Participants emphasised the respect paid to older people in their culture and were mostly appreciative of their families and Canadian policies supporting older people (Bergeron & Lagacé, 2021). Therefore it could be inferred that networks of belonging play a crucial role in conveying positive messages about the meaning of getting old, and thus also play a protective role against the elderly's distress and isolation.

This article will also address another issue, which is well represented in Grenier's studies: the need to adopt the elderly's perspective. It is worth reminding that "there is a clear difference between the vocabulary used by older people and professionals" (Grenier, 2007, p. 432). Furthermore, frailty is not always experienced as a "loss": Scholars who embrace the life cycle theory emphasize that this phase of life can be characterized by a continuity of experience and not by a biographical break, by cognitive development and the implementation of coping strategies for all related issues. Poli (2015) underlines that it is possible to regard ageing as a potentially acquisitive stage, in which new acquisitions can also be used creatively and not just counteractively. Research in this field addresses the issues of body acceptance (Gadow, 1986), the creation of closer family bonds (Lustbader, 2000), the definition of room for negotiation between oneself, and the chances of autonomy that one's current state allows (Grenier & Hanley, 2007).

3. Method

The empirical research reached, from February 2020 to June 2021, 62 dyads made up of an elderly person over 75 and a subject indicated as a reference person in case of need for the elderly. For the identification of cases, the intermediation of the administrations involved and informal networks (associations, neighbourhood networks, relatives, and friends) was requested. This selection method has made it possible to reach that part of the elderly population that is not in charge of services and is equipped with a significant proximity network, both from a family point of view and from a community point of view. The setting of the interviews was chosen preferentially based on the interviewees' confidence with the place and spaces. The interviews were therefore carried out partly in presence, at the home of the elderly, partly online through videoconferencing platforms.

The unit of analysis, characterized by the dyad, led us to use a particular survey tool: the dyadic interview. This form of survey differs from classic one-to-one interviews in its interactivity and ability to involve participants in building a joint response (Morgan et al., 2013).

Dyadic interviews allow one to (a) detect interactions and understand how people co-construct and interpret the social reality of the environments that they live in and share (Reczek, 2014); (b) reduce the time and costs of the survey (Bjornholt & Farstad, 2014); and (c) provide support to the most fragile participant in the conversation (Haahr et al., 2014). The dyadic interview can be organised concurrently (copresence) or sequentially (separation).

In this research, an intergenerational approach was used in the dyadic interview, by analysing the relationship between individuals belonging to two generations from the inside, to gain a deeper understanding of how ageing and frailty are experienced and of what exchanges take place within the family network.

Moreover, since the observation perspective of the transition to frailty is focused on the relational experience of the interviewees, we chose the dyadic copresence interview—joint interview—to investigate the intergenerational relationship of care and support between the interviewees.

Most of the advantages and disadvantages of the joint interview derive from the interaction between the two participants; in fact, access to this interaction is a central feature of the joint interview. The advantages, as described by Allan (1980), derive from two types of opportunities offered by the interaction between respondents: first, the opportunity to study the interaction itself and, second, the opportunity to obtain data. generated by that interaction.

The verbatim transcriptions of the interviews were imported into the NVivo software program and processed using the content analysis method.

4. Empirical Evidence

The dyads interviewed were made up of elderly women, in about 75% of cases, and elderly men in the remainder. The average age of the elderly interviewed is around 82 years, with a clear prevalence (54.8%), therefore, of the group of subjects between 80 and 84 years. The contact persons indicated by the elderly are, in order: adult children in 69% of cases, other relatives, of which mainly the spouse in 14%, a volunteer/friend in 9.7%, and lastly a grandson in 6.5%. Furthermore, net of a substantial prevalence of children, as regards men there is a greater presence of other relatives, while for women the figure of the volunteer is more present. Overall, the reference people are predominantly women, confirming the priority role that women continue to have within families and in care functions, but the presence of men is still significant, especially in the age group up to 59 years.

The target interviewed, in addition to meeting the age requirement, over 75 years of age, must also have recently been the victim of one of the following stressors that relate to three macro areas: (a) clinical; (b) socio-relational; (c) socio-economic (Table 1). The same subject can present more than one stress indicator, and the coexistence of multiple stress levels has been quite frequent.

By analysing the texts of their interviews, the 62 dyads were categorized by how they experience the

Table 1. The stressors of the dyads.

Area	Code	Stressor	%
Clinical	0	Hospitalization for Covid 19	1,7
	1.	Hospital discharge with limited results in daily living activities (six months)	27,4
	2.	Principle of dementia, initial diagnosis without severe impairment in cognitive performance	19,3
	3.	Presence of depressive symptoms (six months)	4,8
	4.	Restriction in basic activities of daily life following a recent functional loss (six months)	17,7
Socio-relational	5.	Assumption of the role of caregiver in favor of the dependent spouse/partner (from one year)	1,7
	6.	Living alone: widowhood, separation, or divorce (for a maximum of one year)	19,3
	7.	Withdrawal from/interruption from voluntary work in favor of others (from one year)	3,2
	8.	Recent change of residence/uprooting (six months)	3,2
Socio-economic	9.	Transfer of children to another city beyond 50 km (one year)	0
	10.	Precarious financial situation, following a sudden impoverishment (six months)	1,7

transition to frailty into three groups: resilient, on-hold, and resigned.

The resilient group identifies dyads that not only succeed in rising to current challenges but also show the ability to adopt a positive approach for the well-being of both members.

Conversely, the on-hold group identifies dyads that do not acknowledge the transition and where both members reached a stalemate while expecting a return to the way everything was before the critical event.

The resigned group includes dyads that are overwhelmed by the stressor and struggling to cope with the complex situation, are pessimistic about the future, or even extremely unbalanced, and where only the reference person can act because the elderly are struggling.

From first synthetic observation, it is possible to appreciate that the three profiles—*resilient*, *on-hold*, and *resigned*—show a significant difference in the perception of ageing. As per Figure 1, the resilient dyad, which is more capable of turning the experience it is going through to its advantage, shows a remarkable ability to foresee the transition ("As I get older, things go exactly as I expected"), although some interviewees claim to be facing more difficult challenges than they had anticipated. The resigned dyad judges the situation in largely negative terms ("As I get older, things go worse/way worse than I expected"): Reality appears to be harder than anticipated. Having not yet decided what direction to take, the on-hold dyad appears to be keener to positively evaluate the present.
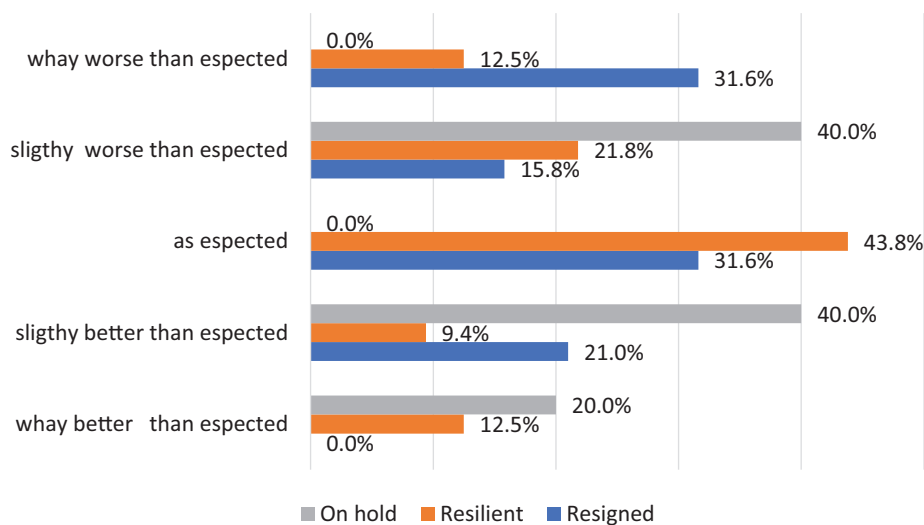
Figure 1. The perception of ageing in resilient, on-hold, and resigned dyads, prompted by the expression "As I grow older, things go…''

4.1. Resilient Dyads

Most interviewees seem to be adapting well to changes and stressful situations. Overall, more than half of the dyads were categorized as resilient (34 out of 62).

Many interviewees were able to respond to stressful events by implementing effective strategies that allowed them to achieve an adequate level of well-being in the relationship between the elderly and their reference person. However, this trend still does not reflect the variety of behaviours, attitudes, and strategies through which resilient dyads can respond to stressors. Also, the responses implemented by the dyads should not overshadow the objective and subjective hurdles along the way. We can determine a prevailing profile with varying degrees and nuances of effectiveness, empowerment, and self-growth.

4.1.1. Resilient Dyads in the Words of the Interviewees

4.1.1.1. Effectiveness

Dyads with an effectiveness profile are those capable of responding to the transition by rising up to current challenges and adopting a new attitude towards events or a more viable action strategy. At first, the loss of the usual reference points causes disorientation, but then a return to the usual routine or an adjustment in habits follows, consistent with the current situation and changed conditions.

Changes significantly affect the dyad in everyday life, with the elderly sometimes being forced to suffer severe limitations and the reference person being forced to respond accordingly. However, the dyad learns how to adjust its winning strategies by trial and error (the code at the end of the following quotes refers to: city, progressive number, age, sex, and stressor number, as per Table 1):

> Now she has to do what he [the husband who died] would normally do…like grocery shopping, because he used to take care of it, and this caught her off guard. (reference person, grandchild—Calderara_03_86_F_6)

> In the morning, but also during the day, I still struggle to take care of the kitchen….I just have to get the hang of it again. (elderly woman—Milan_ 01_77_F_1)

> I had to get organised, and I think I was quite organised….I wrote down my plan for the day, what I had to do, and that *vade mecum*—that's what I called it….[I] detailed essentially how I was supposed to spend the whole day. (elderly woman—Brescia_ 07_84_F_4)

> He has never let himself go. Therefore, although he might struggle or feel a little down at times, he tries not to let it get on anyone. (reference person, son—Milan_ 11_83_M_4)

4.1.1.2. Empowerment

When stressful events occur, readjustment is progressive and not limited to the practical or functional aspects of lifestyle, habits and actions. It also includes a broader adjustment of one's life and condition.

Sometimes, the change is sudden and perceived by the dyad as a true existential transformation leading them to see not only their own condition, but life in general, with a new set of eyes. To this extent, not only does the stressful event represent a challenge to the dyad, but it is also instrumental in developing one's potential, skills, and empowerment. Also, the stressor and transition enable the dyad to be more aware of themselves, their relationships, and what they care about the most:

> Realizing that, even if it happens—can I say if tragedy strikes?...You can still overcome it, it may be something that you do not consider, but it makes you stronger. (reference person, son—Calderara_ 02_80_F_6)

> The first moments were particularly difficult, but as time goes by, I can see that she is more and more calm, relaxed, self-confident. (reference person, son—Calderara _01_84_F_6)

> In these instances, faith is of great help: Therefore, after seeing that he was more serene and, as time went by, that he had those treatments and the medical check-ups went well…inevitably, you relax too. (reference person, sister—Milan_ 06_82_M_1)

> If the Lord has decided that I have to stay here, it means that I'm still of some use. That was the trigger for her to get even more committed to helping us and she became a crucial point of reference. (reference person, daughter—Verona_ 08_88_F_3)

> I feel I've changed, because my reaction to whatever happens is more calm, more patient….There were things that would bother me in the past, but now I let them roll right off my back, I'm more patient. (elderly woman—Brescia_07_84_F_4)

4.1.1.3. Self-Growth

The transition is not just a challenge facing the elderly and their networks, it can also produce positive effects on the well-being of both the elderly and their reference person. Being closer and spending more time together is not just a constraint imposed by the current predicament; it can be a chance to strengthen the bond and build a new understanding, i.e., grow together while acknowledging that something is changing.

For the elderly and their reference person, the learning process—i.e., using the experience itself to improve one's condition and relationship with significant others—

is mirror-like. On the one hand, the elderly has to discover or rediscover virtues that are crucial to face this new chapter in life, such as patience, attention to others, oneself, and relationships; on the other hand, the reference person acknowledges this transition by providing the elderly with a new image of him/her that is consistent with the transition and the relationships guiding it:

> We have learnt how to appreciate even the little things, how to care more about those who suffer, or have issues….There is more compassion, trying to understand…understand those struggles. (elderly man—Milan_07_80_M_10)

> The wound is still open, but the love Gianni gave me will always stay with me and give me the strength to go on. (elderly woman—Verona_ 07_83_F_6)

> Maybe you learn to be a little more patient and handle situations better, even issues, while trying your hardest to still be able to have a decent quality of life. (reference person, son—Milan_ 11_83_M_4)

> There's more tenderness in my heart, I feel closer to my children, all four of them. I have four children, two of them live abroad, far away, but I feel them close to me. (elderly woman—Milan_ 05_88_F_4)

4.2. On-Hold Dyads

As we know, every transition includes elements of risk and potential complications, whose outcome may be uncertain. In one possible outcome, all players involved in the changing process feel somewhat disoriented and may reach a sort of impasse. This can lead, in turn, to denying what happened, or expecting that things can go back to how they were.

In the case at hand, we identified a number of dyads that, albeit to varying degrees, have not experienced transition yet. This does not mean that they did not take action to cope with the present, but that everything is put on hold. Therefore the dyad is more exposed to the risk of not being ready, should the current situation worsen.

That is one way for those involved to respond to a critical event. It includes some specific elements, which fall into three main categories: impasse, denial, and postponement.

4.2.1. On-Hold Dyads in the Words of the Interviewees

4.2.1.1. Impasse

In these dyads, transition has stopped, as it has reached an impasse for very particular reasons.

For instance, one old lady's health issues suddenly ended; she had been tormented by these issues all her life, therefore she felt as if she was living a new youth, with the support of the person who is closest to her.

In some cases, older people face a peculiar situation where they perform the challenging task of being the caregiver of a relative who is not able to take care of him/herself. Taking care of someone's well-being is symbolically rewarding for caregivers, but it also postpones their transition, thus making it more difficult to take care of themselves and focus on their own transition:

> I still feel young! I go places, do stuff, make decisions….I do everything! Right? I'm doing everything here: I wash the laundry, hang it, fold it. (elderly woman—Milan_02_85_F_1)

> To be fair, her case is quite peculiar, because she has always been ill. She is healthier now than when she was young, as she had many issues. (reference person, daughter—Milan_02_85_f_1)

> It is quite satisfying to be able to take care of someone, as far as we can. I think that it was fortunate that I realized he needed help. I take care of him, I live close by [a disabled cousin]. (elderly man—Verona_05_79_M_5)

4.2.1.2. Denial

The on-hold dyad embodies a denial of the transition that can create two very different categories: One includes those who are still in perfect health and fully independent, and are thus capable of planning activities and commitments, perhaps even slightly exaggerated for their age; the other one includes those who somewhat refuse a label and claim to have already overcome the issues arising from the stressor.

Reference people perceive this explicit denial of ageing with ambivalence. They are fully aware of the inherent limits, but they also confirm some sort of postponement of the transition:

> I don't feel old, not at all, really. It's true: I'm planning to visit Japan. (elderly man—Brescia_08_89_M_0)

> I'm here. I can confirm that my dad is not old. I'm learning now of his plan to visit Japan. (reference person, son—Brescia_08_89_M_0)

> I listen to my daughters, but I decide what to do. I know how I feel and what I want to do, that's all. I really felt, not quite old, but almost. Now that period is over. (elderly man—Milan_08_83_M_1)

> Hurrah for honesty! There is [an] inconsistency between age and how it is managed, right? I mean, this is something that annoys me. I spend a lot of time…both Stefania and I…trying to convince him that there are limits, even if he does not perceive them, they are there. (reference person, daughter—Milan_08_83_M_1)

4.2.1.3. Postponement

In other dyads, postponement is evident, leading to a tendency to admit a transition to frailty only in case of serious issues. Therefore, in family histories, only a condition perceived as definitely incapacitating is acknowledged as the beginning of old age. These dyads somehow reflect the outcome of a broader social narrative that cannot seem to find true potential and positive resources in this phase of life. Unlike in resilient dyads, there is no room for a positive outlook.

In short, these dyads claim that someone does not become old until they are sick:

> No, I don't feel too old, not at all. (elderly woman—Milan_04_80_F_4)

> No…not old. She's in excellent health…she's still very active. (reference person, grandchild—Milan_04_80_F_4)

> I don't feel too old, at least for now. (elderly woman—Verona_01_78_F_1)

> If we regard the elderly as a retired person anyway, someone who is at home, who follows the usual routine of fetching bread and going to the doctor; if this is the kind of mental image we have, then she's different. She's also very active socially, in the parish, in the village. (reference person, daughter—Verona_01_78_F_1)

4.3. The Resigned Dyad

This profile encompasses the dyads reportedly facing an essentially negative and complicated transition, without being able to find any trace of positivity or personal and family enrichment.

In these instances, the transition is deliberately launched; however, the dyads experience only its negative aspects. Albeit for different reasons, both members are struggling, often because of some sort of inevitable fate, but also because of someone very close, or of a lack of material and relational resources.

For 19 pairs of subjects, the transition was quite challenging, not because stressors were more traumatic, but because all players involved were quite overwhelmed by dramatic events that they could not overcome. The underlying justification is that ageing entails a loss of health and independence in social functions. Therefore the prevailing mood is distinctly depressive.

Still, this profile also includes differences that may be associated with keywords like dependence, ineluctability, and frustration.

4.3.1. Resigned Dyads in the Words of the Interviewees

4.3.1.1. Dependence

For these dyads, the transition unfolds in a negative way. Regardless of the support provided by the reference person, the need to depend on someone, especially children, triggers a sense of sadness, of regret for the heavy burden falling on the children.

The perception of gradually becoming dependent on others is what makes the experience of ageing appear negative. In light of this feeling, it is difficult for the elderly to accept solutions that would be logistically more optimal, with people available for help and support:

> Then she started to get old, like everybody else, and at times she could not use her bicycle, buy her groceries, which means a lot to her, being able to go, choose, decide what to cook. That is how her impairment began. (reference person, daughter—Abbiategrasso_07_82_F_2)

> Yes, this is not easy for me, because I feel that his illness is consuming him. And I get anxious, I'm afraid I cannot cope with that, because what my daughter can give me is already too much: She has a family, three small children, and she cannot provide me with all the help I might expect, it's impossible. (reference person, wife—Verona_10_75_F_5)

4.3.1.2. Ineluctability

In some cases, entering old age coincides with losing one's spouse. This death is regarded as a negative event preventing one from living the last phase of life peacefully, also because it somehow anticipates one's own death.

In other cases, it coincides with losing specific caring tasks within the family network. For instance, tasks related to grandchildren, who have grown up and no longer need their grandparents looking after them.

Lastly, the gradual loneliness, which, in some cases, is a source of distress, is the result of a life where no bonds were formed and further heightens the feeling of resignation and helplessness towards this difficult phase of life.

Even those with a husband and children do not always seem to have built an extended network of meaningful bonds around their family but report a very sheltered family history, which has gotten even more limited and fragmented over time:

> I'm a very negative person, very negative indeed. They tell me: "You're anxious." I take Lexotan, the sleeping medicine…and if no one comes by at a certain time, I wonder whether everyone is home, whether everyone is okay. That's how I live, I lead a miserable life, see? I'm in a terrible state. I tell Marialuisa that I'm sorry, and it hurts, maybe I'm

not showing her that, but it hurts. (elderly woman—Abbiategrasso_05_83_F_4)

When your mind tells you: "Now I'm going home and I'm sure that he will be there…" But he is not there. And then your anxiety grows a little bit, it grows a little bit, and it does not feel good. (elderly woman—Calderara_04_80_F_6)

Yes, one thing she often says is that she feels useless. (reference person, son—Milan_06_83_F_1)

Yes, nobody needs me. (elderly person—Milan_07_92_F_4)

I did not expect such a decline, and so soon regrettably. It happened, unfortunately, and we cannot change that, that's it. It's not that we ignore it, or don't care about it: it's just that nothing can be done. (reference person, wife—Verona_07_76_M_4)

4.3.1.3. Frustration

Dyads in which the elderly reports a complex situation and the reference person claims that his/her supporting role is an unbearable burden appear to be in an truly awful predicament. An animosity towards life also emerges because it entails too heavy a commitment.

This is usually associated with a lack of supporting relationships, and consequently with being entirely alone in dealing with issues.

Clearly, the experience of frustration is crucial in the dyad's response to the specific stressor and in its ability to find effective strategies:

Yes, I feel old, and I feel older every day, because I have a degenerative disease which will lead me to death. Since when? Well…since I was born. (elderly person—Verona_02_77_F_8)

To me, it's a heavy burden on my shoulders, because we have economic issues. I have a taxing job and therefore I struggle physically and psychologically. I'm alone with a child, divorced, I have a teenage son, I had my hands full already. (reference person, daughter—Verona_02_77_F_8)

This situation has taught me that I have to make do, with everything. (reference person, daughter—Verona_02_77_F_8)

5. Discussion of the Results

From the above verbalisations, it is possible to extract a long list of words through which the elderly express and describe themselves. They never use technical terms like frailty, vulnerability, non-self-sufficiency; they use rather common terms which show a clear view of what they are experiencing.

As shown in Figure 2, the most used term is "years," followed by "home," and "I feel alone." For almost everyone, the key element of feeling old is the years passing by and the astonishment at how quickly they have passed, with some differences between the elderly and the reference person. Home is par excellence the place where life goes on: It is both a protection and a cage from where it is increasingly difficult to escape and offset that widespread sense of loneliness among all interviewees, despite family or friends being available to provide

Figure 2. The House of Words: How the elderly and their reference people represent ageing. Note: The words in the house were identified through the NVivo software through a "word frequency" of the words in the analysis code of the "ageing" text corpus, which includes the interview excerpts concerning the elderly's personal self-perception and the reference persons' representation of ageing.

support. However, in resilient dyads, the words "I think," "I do," "I'm going," "I can" have a positive and factual meaning, whereas in resigned dyads, they express the impossibility of playing a key role. The word "fall" conveys the idea of being afraid of running the risk. For many, the stressor was a fall which got them into the hospital, or which made them feel insecure and made their reference person worry.

Other words, however, eloquently express how the elderly and their reference person feel: "life," "days," "age," "good," "bad." They suggest an assessment of one's life and the great dilemma as to how much good and bad there has been in one's experience.

The representations, shared by the dyads, show a less traumatic view than what often emerges from the claims of experts.

The interviewees show a vision of the phase they are experiencing consistent with their previous active life and with the value they attributed to relationships and their capacity for commitment.

In summary, it can be noted that those facing transition in a more functional way display the ability to learn from experience. The interviewees' accounts reveal that this ability is essentially the ability to positively reinterpret the stressful event: The critical event can thus produce not just negative effects, but also positive ones, and the dyads will acknowledge having learnt important lessons from it, which have allowed them to grow and mature. For instance, the accounts reveal deeper compassion for those who suffer and increased sensitivity to such issues.

This learning ability and self-growth can be associated with the idea of post-traumatic growth developed by Tedeschi and Calhoun (1996), i.e., the possibility of achieving personal and interpersonal growth in three main areas: change in interpersonal relationships, self-perception, and in lifestyle. The growth achieved by the interviewees and the lessons they learnt also play a significant role in the dyad, since the reference person acknowledges and appreciates this change, producing a new and more positive self-image in the elderly person during this transition.

Conversely, as opposed to the more functional profiles, the dyads facing difficulty are fully focused on themselves, and thus concentrate their attention on preserving activities that are considered essential. This inevitably entails a reduction in their reference network. Their perspective appears more conservative and leads the members of the dyads to not devote time or allocate resources to others. The alter of the dyad acts as a mirror and re-asserts a more passive approach in social representations, while sometimes producing a sudden and early withdrawal.

Conflict of Interests

The author declares no conflict of interests.

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Article

Three-Generation Households in a Central and Eastern European Country: The Case of Hungary

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Abstract
Using data from censuses and a microcensus between 1980 and 2016, this study examines the trends in three-generational living arrangements, along with the factors that determine the prevalence and characteristics of the phenomenon in Hungary. Apart from the period between 1990 and 2001, the proportion of three-generation households declined in all periods among households with children. In the decade after 1990, the rate increased due to the post-transition economic recession and the severe housing shortage. The factors predicting a higher risk of three-generation households were fairly consistent across the period considered, and the direction of the effect remained stable. However, some of those factors became more relevant over time (e.g., the education level of parents and single parenthood) and some became less relevant (e.g., rural residence). Meanwhile, three-generation living is increasingly linked to social disadvantage, which is also the leading cause of poverty. This living arrangement is strongly associated with a stage in life where young people start to have children. Using data from the Hungarian Generations and Gender Survey, we determine that three-generation living affects a significant proportion of families with children at a particular, relatively brief stage in their lives.

Keywords
grandchildren; grandparents; Hungary; living arrangements; three-generation households

1. Introduction

For centuries, three-generation households (TGHs) were a widespread living arrangement in certain regions of Europe and certain social groups (Andorka, 1996; Faragó, 2011; Laslett & Wall, 1972; Ruggles, 2003). In these households, grandparents, parents, and grandchildren lived together. Older people played as big a role in the household as either the active-age generation or younger age groups and children. In peasant societies, the basis of co-residence was mainly the family farm and involved a division of labor between household members. As the household began to decline in importance as an economic entity, there was an increase in the prevalence of nuclear families, with typically only one or two generations living together. The greater emphasis on individual earnings, the expansion of the pension system, the rise in the overall standard of living, the change in attitudes towards multigenerational living, increased spatial mobility and certain other fundamental structural changes in society also played a part in the decline of TGHs (Goldscheider & Lawton, 1998; Ruggles, 2007). That said, co-residence remains a relevant intergenerational transfer, alongside time and money transfers in some regions of Europe, mostly in Eastern Europe (see Figure 1). Without taking account of this, we could reach an inaccurate conclusion about what older generations provide by way of support for their children/grandchildren. This is partly because sharing a home is already a transfer in itself (Dunifon et al., 2014, 2018), and partly because co-resident grandparents are considerably more likely to be caregivers than are grandparents who live apart from their grandchildren (Fuller-Thomson & Minkler, 2001; Fuller-Thomson et al., 1997). But we also see younger members supporting the elderly: They can be a huge help, especially for very old
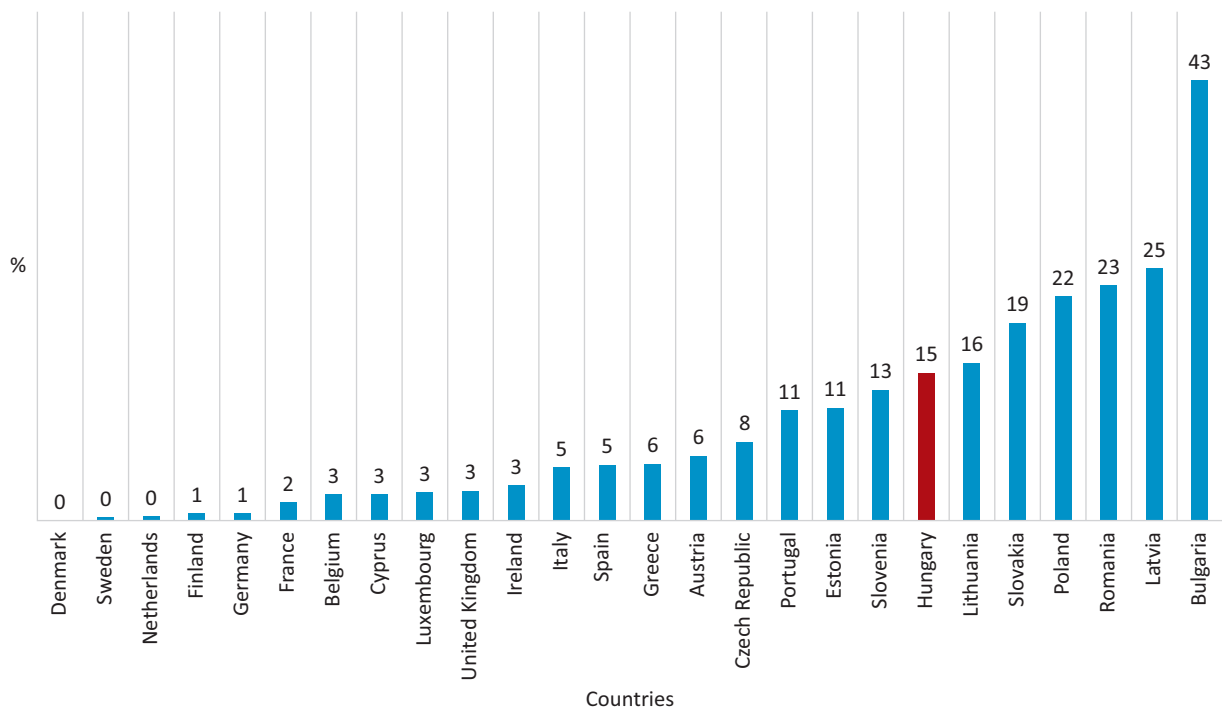
Figure 1. Share of children under the age of 18 living in a TGH, 2008 (in percentages). Source: Iacovou and Skew (2011).

people who are limited in their daily activities (Burgess & Muir, 2020).

Most of the research of recent decades indicates that a significant part of intergenerational transfers flows from the middle-aged generation to the children, and from the elderly to the middle generations and grandchildren. The elderly receive transfers from younger generations only at the very end of their lives, one form of which is that elderly people in need of care move into the households of their adult children (Choi, 2003; Hays, 2002). The coexistence of the middle-aged and elderly generations is mainly the result of life events that affect the middle generations, such as job loss or divorce (Aquilino, 1990; Choi, 2003; Ward et al., 1992; Ward & Spitze, 2007). TGHs can be a safety net for disadvantaged families with children since the members of the household can use their resources more efficiently and thus reduce the economic risk (Cross, 2018; Moffitt, 2015; Mollborn et al., 2012; Perkins, 2017; Pilkauskas & Cross, 2018). Several researchers have pointed out that the needs of the parents and grandchildren rather than of the grandparents are more strongly associated with the formation of TGHs (Albuquerque, 2011; Aquilino, 1990; Bianchi et al., 2006; Pilkauskas, 2012; Verbist et al., 2020).

Three-generation coresidence affects children's cognitive, behavioral and educational outcomes and also their well-being (Amorim, 2019; Dunifon, 2013; Dunifon & Kowaleski-Jones, 2007; Ellis & Simmons, 2012; Foster & Kalil, 2007; Hill et al., 2001; Mollborn et al., 2012; Pilkauskas, 2014). Most research on children's living arrangements focuses on the presence or absence of the child's biological parents, the partnership status of the

parents, and the composition of the siblings. Additional household complexity remains understudied in most European countries. There is also very little research on the subject in the Eastern European region, even though TGHs are more prevalent in several countries there.

The aim of this article is to address previous research gaps by examining how the proportion of TGHs has changed over time in an Eastern European country, which factors determine whether a child lives in a TGH, and how durable the TGH is as a form of living arrangement. This last question is important because the point-in-time measures underestimate the prevalence of ever having lived in a TGH (Amorim et al., 2017; Cross, 2018; Pilkauskas, 2012; Pilkauskas & Martinson, 2014).

The study tries to point out that any description of the living conditions of families with children requires a much more detailed classification of households, examining those living in TGHs as a separate category. This is particularly important in Eastern European countries, including in a country like Hungary, where the prevalence of TGHs has been decreasing over time, but even today it is not insignificant and is particularly high in certain types of families with children and at certain stages of life.

In the period examined in the study, between 1980 and 2016—especially in the period after the regime change in 1990—access to housing in Hungary was difficult. One of the reasons for this is that the proportion of privately owned apartments in Hungary is extremely high. Furthermore, almost all urban municipal rental apartments were privately owned in the period after 1990. This made it exceptionally difficult to obtain an apartment, as a very serious investment was needed for someone to acquire an apartment of their own.

The difficulty in obtaining housing may be one of the reasons why the proportion of TGHs in Hungary is above the European average.

The fact that the houses built in the 1970s and 1980s—which were mainly in rural areas and in the construction of which the household itself was often heavily involved (Sik & Kelen, 1988)—were large enough also played a role in the prevalence of TGH. The owners of the houses thought that they would also provide housing for the next generations. Houses were one of the most important forms of intergenerational resource transfer (Harcsa, 1991). Although gaining independence from their parents was important to the younger generations, if the younger generations could not get an apartment of their own, these houses enabled the generations to live together.

From the point of view of understanding the Hungarian context, the fact that family ties are quite strong in Hungary is also important. Parents also support their adult children through several channels (Bocz & Harcsa, 2001; Harcsa, 1991). According to social norms, it is completely acceptable in Hungary for grandparents to provide serious help in resolving the housing problems of families with children, even if they move in together with the younger folk.

2. Literature Review

Comparative European research into the prevalence and characteristics of TGHs is fairly sparse, but what there is reveals a huge difference between countries in contemporary Europe in terms of the prevalence of households with grandparents and grandchildren living together. In many Northern and Western European countries, the proportion of minor children who were living with both their parents and their grandparents in the late 2000s was around 1% to 3%, whereas in Eastern European countries it was typically over 10%; in some countries it was even over 20% (see Figure 1). In Hungary, 15% of children under the age of 18 were living with their parents and grandparents in the same household.

There are several ways of understanding the differences between countries. Research into TGHs has highlighted the influence of a country's general economic situation, cultural context, and welfare policies (Glaser et al., 2018; Preoteasa et al., 2018). At the same time, it suggests that these differences go only some way towards explaining why there is such variation in the proportion of TGHs. Presumably, various other unmeasured factors also play a part, for instance, the prevalence of familism, attitudes about residential independence, religiosity, characteristics of the housing sector, housing costs, characteristics of women's labor market participation, and spatial mobility.

It is clear that, in the vast majority of countries, the prevalence of the TGH has steadily declined over time (Glaser et al., 2018; Vasconcelos, 2003; Wall, 2004). But we can also find counterexamples in Portugal, the United

Kingdom, Slovakia, Romania, and Poland (Albuquerque, 2009; Eurofound, 2019; Glaser et al., 2018; Nandy et al., 2011). Beyond Europe, the US and Canada have also seen an increase in the proportion of TGHs (Battams, 2017; Cross, 2018; Pilkauskas et al., 2020). According to American research, the rate has increased dramatically over the last two decades (Pew Research Center, 2010; Pilkauskas et al., 2020; Pilkauskas & Cross, 2018; Pilkauskas & Dunifon, 2016). In recent times, growth in the proportion of TGHs has generally been linked to spells of economic recession (Keene & Batson, 2010; Pew Research Center, 2010, 2011).

US research has also shown that the proportion of children who have lived at some time in a TGH is much higher than is suggested by point-in-time measurements (Amorim et al., 2017; Oberlander et al., 2009; Pilkauskas, 2012). Research also indicates that the duration of three-generation co-residence is generally short (Beck & Beck, 1989; Pilkauskas, 2012), although disadvantaged children often live in a TGH more than once in their lives (Harvey, 2020; Mollborn et al., 2012; Oberlander et al., 2009).

Prior studies—mainly American research—have identified some key factors associated with living in a TGH. Regarding demographic characteristics, the research shows that TGHs are more common during early childhood (Amorim et al., 2017; Casper & Bryson, 1998; Cross, 2018; Pilkauskas, 2012), among mothers who experience teen/young-aged pregnancy (Pilkauskas, 2012; Trent & Harlan, 1994), single mothers (Cohen & Casper, 2002; Dunifon et al., 2014; Kreider, 2008; Pilkauskas, 2012), and mothers with one child (Pilkauskas, 2012). Regarding socio-economic characteristics, the TGHs are typically over-represented among households with lower income and less education (Albuquerque, 2011; Glaser et al., 2018; Pilkauskas, 2012). Some research has also revealed that TGHs are clearly linked to the rural environment (ILC, 2012; Monostori, 2021).

3. Research Questions and Hypotheses

Here, we address the question of how the share of TGHs in Hungary changed between 1980 and 2016. How structural changes in each period affected the process, e.g., the decline in the proportion of families with children, the shift among younger age groups to better educational qualifications, the different unemployment levels, and the changing structure of families according to the age of the youngest children and parents' partnership status.

After presenting the macro-level processes, we will also examine at the micro-level what factors make the experience of TGH likely, and how the impact of these factors has changed over time. Based on the results of the earlier literature, our hypothesis is that a low level of education of the parental generation, a low level of labor market participation, single-parent status, a smaller number of children, and the presence of infants/toddlers in the family all increases the probability

of living in a TGH. Based on the Hungarian characteristics presented at the beginning of our study and based on our previous research (Monostori, 2021), it is also likely that TGHs are more likely in a rural environment.

Then we consider how the links between demographic and sociological characteristics and multigenerational co-residence have changed over time. In this regard, our main hypothesis is that the effect of low education of parents' generation, which has the closest correlation with poverty, will become stronger over time. The reason for this is that the proportion of people with a low level of education has steadily decreased over time, but the individuals in this category have increasingly been excluded from society.

Finally, we examine how TGHs are created and whether they can be regarded as a permanent fixture or a temporary phase. As we mention above, American researchers have determined that a significant proportion of TGHs exist for a relatively short duration, and are typically associated with early childhood.

4. Data and Methods

4.1. Data

We used census data from 1980 to 2011, as well as the 2016 microcensus and the Hungarian Generations and Gender Survey (GGS). The 1980, 1990, 2001, and 2011 censuses offer a complete dataset (approximately 10 million people and 4 million households), while the 2016 microcensus covers a 10% sample of the population. The data content of the censuses is in line with international standards and provides an opportunity to examine TGHs according to basic demographic and certain sociological characteristics. The data content of the 2016 microcensus is much richer than that of the censuses, and the exceptionally large sample provides extraordinary scope for data analysis.

Here, we basically deal with those TGHs where at least one member of the youngest generation has the status of a child and is aged 0–24. There are fundamentally three reasons for this. The first is that we tried to homogenize our sample in this way, since there may be some TGHs where all three generations consist of adults—these have presumably come together for totally different reasons than if the TGH contains children. Second, we wanted to use a definition of children that is used in many other cross-country comparisons based on censuses. And finally, we realized that with this approach we could cover the vast majority (84%) of TGHs. At the same time, we could obviously use other child definitions. In Hungary, the age of majority is 18, so we could also consider those under 18 to be children. However, the age at which young people move out of the parental home has shifted significantly over the past two decades. That is why we decided on a higher age limit.

The sample was therefore restricted to those households with children aged between 0 and 24. Within these, we distinguished TGHs and non-TGHs. TGH was defined as a household that included at least one child, one parent, and one grandparent.

The Hungarian GGS is a representative demographic panel survey, launched in 2001 and with subsequent waves in 2004, 2008, 2011, and 2016. The initial personal sample size was approximately 16,000, but this had dropped to approximately 6,300 by the 5th wave. From this sample, we selected those parents who lived with at least one child aged between 0 and 24 during the observation periods. The even narrower sub-sample included those who were living in a TGH at the time of the initial observation. In the analysis, we examined the proportion of TGHs at the different periods that were still TGHs at the end of the observation period. Since we do not have information about the changes in the household structure between two observation times, our results do not accurately reflect the occurrence of changes in the household structure.

4.2. Measures

The dependent variable is dichotomous: Households with two generations only are assigned a value of 0, while those with three generations are assigned a value of 1. The independent variables refer to parents and grandchildren, i.e., the middle and youngest generations. Household level variables were used. Regarding the parents' education, the parent who had the higher level of education was taken into account.

Our analysis is based on descriptive statistics, and we also use the tools of direct standardization to present the macro-processes that influence the prevalence of TGHs. In these analyses, the 1980 distribution of the population according to different variables (education attainment of parents, age of the youngest child, partnership status of the parents, number of earners) was used as a standard. These variables were chosen because they have an impact on the formation of TGHs, and there were significant structural transformations in them during the period under review.

For micro-level analysis, logistic regression models were used. In the regression models, we worked with a pooled household dataset, with data from all censuses and the microcensus. This allowed us to examine the effect of the socio-demographic variables in the interaction with a given year. Simple descriptive statistics were used in the analysis of the durability of the TGHs structure.

5. Results

5.1. Trends in the Prevalence of Three-Generation Households

During the period under consideration, the share of TGHs fell from 7.5% to 2.9%. In only one census period (i.e., the years between censuses) was there no decline in

the proportion of TGHs: In both 1990 and 2001, 5.1% of households had three generations living together.

One reason for the declining trend is that the proportion of households with children also fell significantly over the observed period: In 1980, 48% of households had children, whereas in 2016 the figure was only 32%. Among families with children, the decline in TGHs moderated between 1980 and 2016, and there was actually a rise in prevalence between 1990 and 2001 (Figure 2). Overall, among households with children, the proportion of TGHs declined from 15.5% in 1980 to 9.2% in 2016.

The decline in TGHs in the 1980s was compounded both by the decline in the proportion of households with children and by the fact that among families with children ever fewer people lived in such households. In the 1990s (i.e., covering the years of economic recession following the change of regime), there was no decrease in the proportion of TGHs across all households. But behind the apparent stability, two processes were pulling in opposite directions. On the one hand, the share of households with children continued to decline. But at the same time, an increasing proportion of families with children lived in multigenerational households: In 1990, 11.5% of families with children were living in a TGH; by 2001 that figure had risen to 12.4%. This is presumably because unemployment soared in the 1990s, living standards plummeted and municipalities sold their rental housing, leaving broad sections of society facing housing difficulties. Since the 2000s, the fall in the proportion of families with children and the fact that fewer and fewer of those families live in TGHs have fuelled a significant decline in the prevalence of this form of cohabitation across all households. At the same time, we see that, between 2001 and 2011, the rate of decline was greater for all households than for households with children. This is because the extremely low fertility rates meant that the proportion of households with children dropped significantly faster than the proportion of TGHs among households with children. After 2011, following a spectacular improvement in fertility rates, due to

the very strong pro-natalist policy of government, the decline in the proportion of families with children slowed (Monostori & Murinko, 2018). At the same time, the share of TGHs among households with children fell more than in the period 2001–2011. These two factors explain why the rate of decline in TGHs between 2011 and 2016 was very similar among all households and households with children.

The shift in the proportion of TGHs is also related to the fact that there have been certain structural changes among families with children: Some have amplified and others have moderated the changes that would anyway have resulted from a shift in the proportion of TGHs in demographic and sociological groups. Four of the factors we examined reveal significant structural changes: the distribution of households according to the educational level of the parents; the age of the youngest child; the proportion of parents raising their children on their own; and the number of active earning parents. The effect of these structural changes was measured using the standardization method—i.e., by considering how the proportion of TGHs would have changed, if the structure of households had not changed in the period after 1980 in terms of the factors mentioned above.

Of the factors that correlated with TGHs, restructuring by educational attainment was the most significant. Between 1980 and 2016, the proportion of parents with only primary education dropped from 64.3% to 31.6%. Meanwhile, the proportion with secondary education rose from 24.5% to 35%, and with tertiary education it was from 11.2% to 33.4%. Since parents with only primary education are more likely to live in a TGH than those with higher education, the decline in the proportion of poorly educated households contributed to the decline in the proportion of TGHs in the period under review. Figure 3 compares the observed ratio of TGHs to their directly standardized counterparts. Had the structure by educational level of the middle generation remained constant, the proportion of TGHs would have declined from 15.5% to 10.7%. That is, if the structure by educational
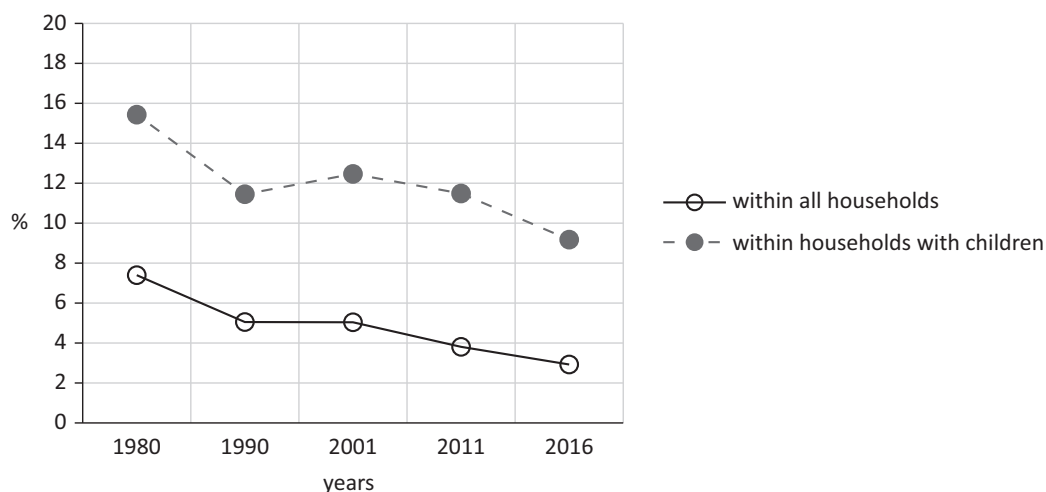
Figure 2. The ratio of TGHs within all households and households with children, 1980–2016.
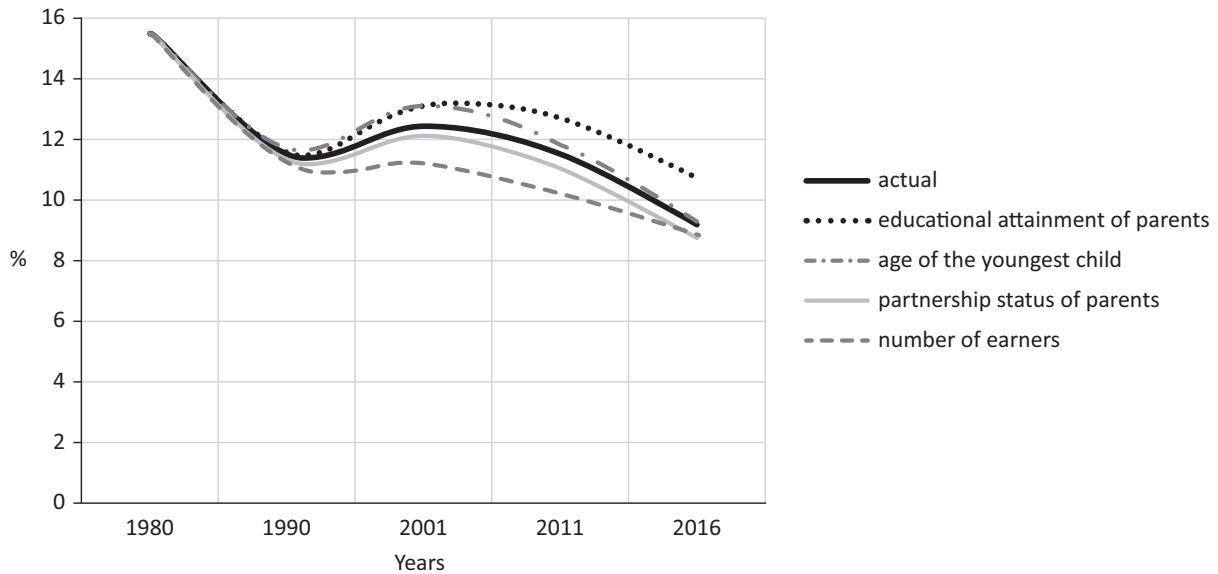
Figure 3. The actual and directly standardized ratio of TGHs. Note: The distribution of households in 1980 by each demographic and sociological factor is used as a standard.

attainment had not changed, the decline would have been smaller; but that structural change was not decisive in the decline in the proportion of TGHs.

Low fertility and the tendency over time for young people to stay with their parents for longer meant that, among households with children, the proportion of preschool-aged children (aged 0 to 6) fell over the observed period. In 1980, 43.4% of households had children aged 0 to 6, and in 1990 this figure was 32.6% (with similar proportions in the following years). This structural change certainly had some effect on the trend between 1980 and 2016. However, it did not significantly affect matters: If the structural change had not occurred, the share of TGHs would have been only 0.1% higher.

The proportion of single-parent households also changed between 1980 and 2016, although the direction of travel shows no clear trend. In 1980, among households with children, the proportion of single parents was 14.1%; by 1990 the figure had risen to 20.5%. But then the proportion of single-parent households was 19.8% in 2001, 25% in 2011, and 22.2% in 2016. This structural change did not significantly affect the proportion of TGHs, but if the proportion of single parents had not increased after 1980, the proportion of TGHs would have been slightly lower in the new millennium.

We also hypothesized that parents' labor market activity could also determine whether three generations lived together. Until 1990, the proportion of employed people in Hungary was very high—not only among men but also among women and mothers with children. In 1980, in three-quarters of households with children aged 0 to 24, both parents were active in the labor market. And in the remaining quarter, one parent worked. The proportion of households without any earning parent was below 1%. The proportion of two-earner households had fallen to 53.3% by 1990 and 38.4% by 2001—

a low level that remained in 2011. At the same time, the proportion of households where neither parent worked was 7.2% in 1990, 17.8% in 2001, and 16.9% in 2011. If the employment level of parents had been as high in the years after 1980 as it was in 1980, the proportion of TGHs would have fallen more sharply.

5.2. Factors Contributing to the Formation of Three-Generation Households

In addition to macro-level analyses, the study also looks at which demographic and sociological characteristics increase the likelihood of TGH formation, and how their effects have changed (Figure 4). Do the differences between the years remain once we remove the effect of structural changes on the variables examined?

Assuming that the effect of each demographic and sociological characteristic also changes over time, we developed a logistic regression model that shows both the "main" effect of those characteristics and the different effect of each characteristic from year to year (interaction effect).

Similar to previous research results in Hungary, we found that the three-generation living arrangement is clearly linked to the rural environment. There are probably several reasons for this. One is that services designed to meet the day-to-day needs of older people are generally less accessible in villages than in towns, while child welfare services are also more limited. Consequently, in the countryside, generations are much more interdependent than in the cities. Also, the housing structure of villages and cities differs: Housing in villages tends to be more spacious than in towns, but it also tends to be of lower value than similarly-sized urban accommodations. Thus, there is more space and opportunity for three generations to live together; but there is also less
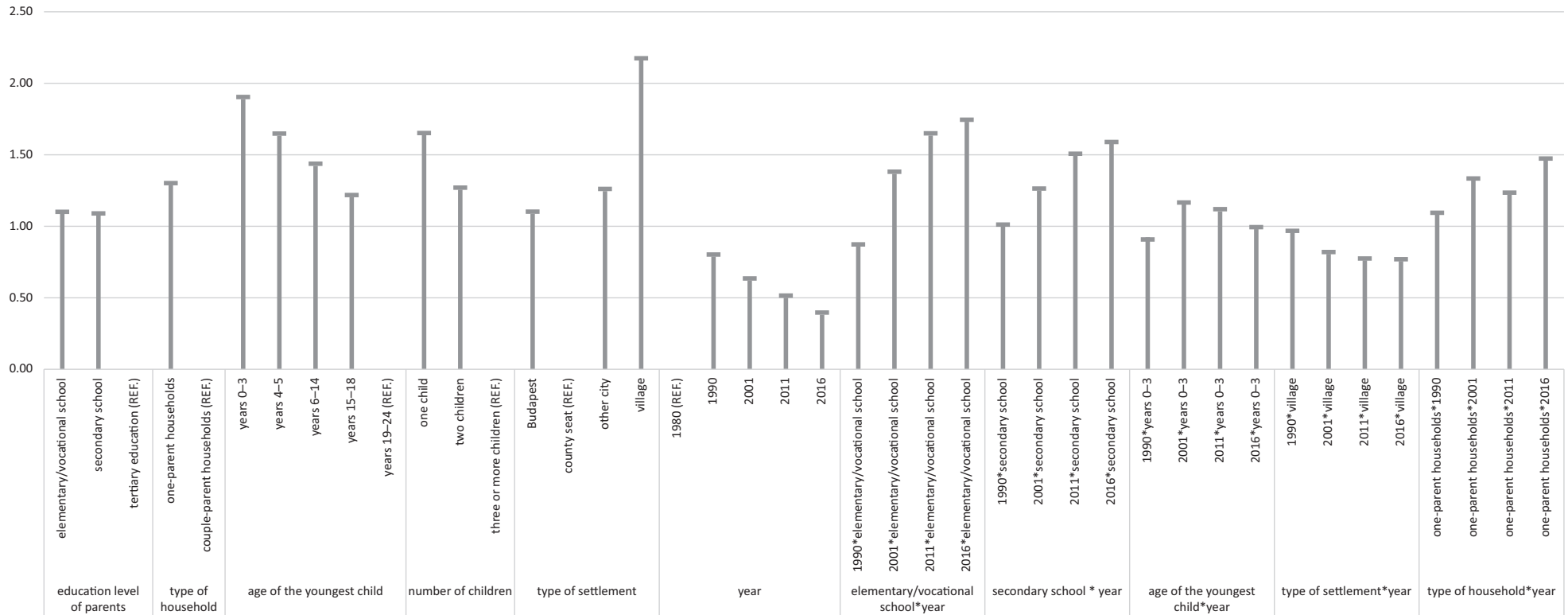
Figure 4. Demographic and sociological characteristics that determine three-generation living arrangements (results of the logistic regression models, odds ratios). Notes: Household-level data; all effects are significant at the p < 0.001 level; dependent variables are non-TGHs (0) and TGHs (1).

scope for the younger generations to move away from the parental home. At the same time, it is clear that the differences by type of settlement have narrowed. This is mainly because, in the 1980s, the proportion of three-generation families in villages declined much more rapidly than in other types of settlement.

Reflecting previous research results, we find significant differences in the chances of the formation of a TGH according to the educational level of the parents. The highest odds ratio was measured in households where the reference parent had only primary education; parents with secondary education were significantly more likely to be in a TGH than those with a degree. And the differences in educational attainment have increased over time: Thus, extended households that include grandparents and grandchildren are increasingly associated with low educational attainment, which is a proxy for social disadvantage.

As well as education, we examined the effect of the parents' labor market status. To this end, we developed a variable showing how many members of the middle generation are in the labor market. Uncontrolled effects suggest that if there is no or only one working parent in the household, the likelihood of a TGH is significantly higher. However, in multivariate models, this effect is not significant, because the labor market situation is closely correlated with educational attainment and the age of the child(ren): This is because the vast majority of mothers in Hungary leave the labor market when their baby is born and remain at home until the child is 2–3 years of age.

Demographic variables suggest that this form of cohabitation may be closely associated with a particular stage in life. Previous research has shown that the number and the age of the children are strongly correlated with the emergence of a TGH: Families with just one infant or toddler are more likely to live in a TGH than those who have more or older children. The significant effect of the age of the youngest child suggests that some TGHs are formed because the middle generation cannot move away from the parental home, and so a new family is started there. However, it would also appear that the effect of the age of the youngest child varies from year to year: The economic crisis of the 1990s and the severe housing shortage meant that families with children aged 0 to 3 were more likely to live in a TGH in 2001 and 2011 than in other years. After 2010, a swathe of family policy measures sought to support young families with a small child or expecting a baby; thus, in the 2016 microcensus, the odds of multigenerational cohabitation were found to have increased much less than previously, provided the family had an infant or toddler.

The formation of TGHs is also related to the fact that, following divorce, some parents with a child move back home to be with their own parents. Previous research in other countries also identified this effect but it is particularly strong in Hungary—and is growing stronger over time. In 2016, in particular, the risk of single-parent families living in a TGH was high.

For 2016, the regression model was supplemented by additional variables from the 2016 microcensus (Figure 5). Our multivariate model now contained individual-level data and all the variables we included in the previous models (without the interaction effect). These variables were life-course data and referred to the parents' own origins, their position in the labor market, and the age at which they had their first child. We hypothesized that those whose parents (i.e., the grandparent generation) had a lower level of education were more likely to live in a TGH than those whose parents had a higher level of education. We can assume that the social disadvantages associated with the low educational attainment of grandparents make it difficult for the middle generation to move out of their own parental home. It also increases the chances that, following divorce/separation, the middle generation will move back in with their parents, taking their children with them. Unfortunately, the data do not allow us to examine the background of both members of the middle generation: We could only examine the educational attainment of the respondent's father. The data confirm our hypothesis: Those in the middle generation whose parents had a lower level of education are more likely to live in the parental home than those whose parents had a higher level of education. It also increases the odds of three-generation co-residence if the parent (middle generation) has at some stage been unemployed (although that effect is not as strong as expected). In part, this is because the educational attainment included in the model is closely correlated with labor market status. However, it is not the whole story, since the uncontrolled effects are not very strong either. This requires further elucidation.

As a third element in the life-course data, we examined the impact of the age at which the first child was born on the likelihood of living in a TGH. Uncontrolled effects clearly indicate that the earlier someone has their first child, the more likely they are to live in their parents' home, along with their children. This is because the younger one is, the less chance one has had to accumulate the capital required for independence. However, in multivariate models, we no longer see this effect, since the correlation between the education level and the age at which the first child was born is very strong.

5.3. The Emergence and Duration of Three-Generation Households

An important question in seeking to understand the nature of TGHs is how they arise and how long they last. Previous research and our own investigation both suggest that three-generation cohabitation is concentrated in the period after young people start a family. We can assume that, generally, after a few years, young people then leave their parental home. But the middle generation may move back in with their parents if something occurs (e.g., divorce or widowhood) that requires them
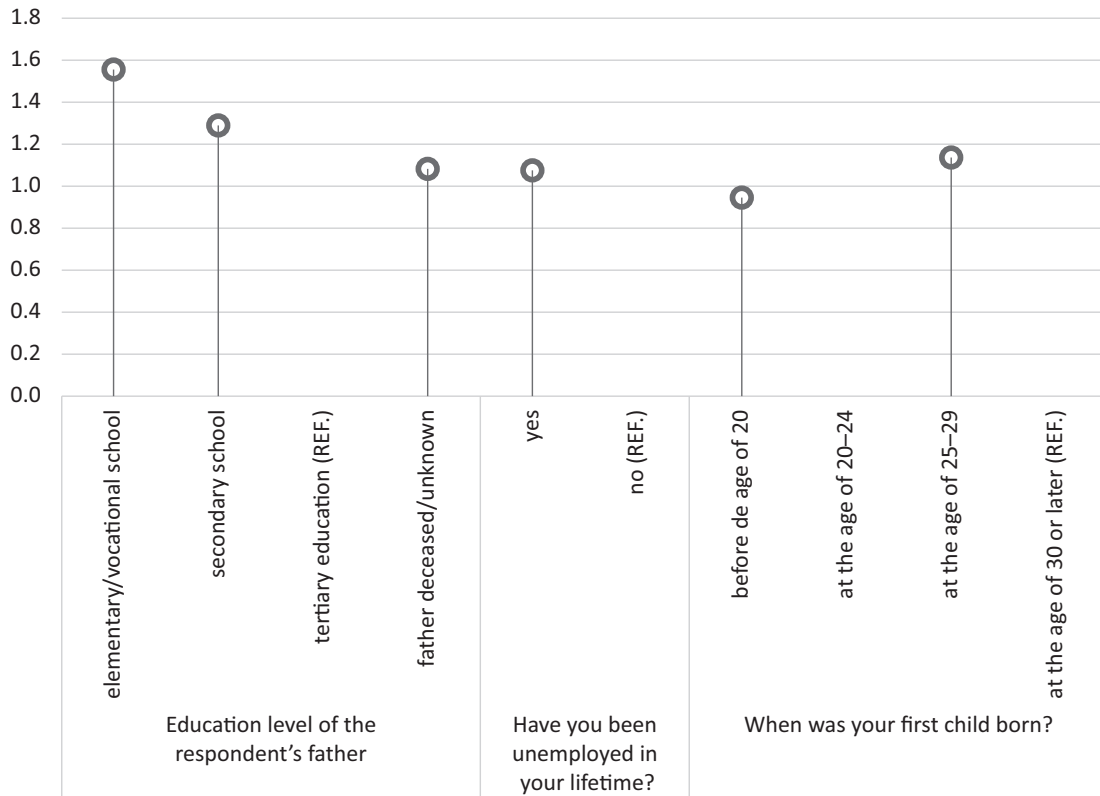
Figure 5. Life-course characteristics that determine the three-generation living arrangement, 2016 (results of the logistic regression models, odds ratios). Notes: Individual-level data; all effects are significant at the p < 0.001 level.

to leave their own home (Aquilino, 1990; Choi, 2003; Ward et al., 1992; Ward & Spitze, 2007). To examine this in detail, life-course data would be needed, showing the structure of the households in which individuals have lived at various times. Such data are not available; however, we can examine some issues using data from the GGS, which followed individuals for 15 years. Moreover, after 2004, respondents were also asked how long they had lived with members of their household. The sample size of the GGS does not allow a more detailed examination by social strata and demographic groups, but it is suitable for tackling some basic questions.

The first such question is the proportion of those living in a TGH that emerged without the middle generation ever moving away from the parental home. Among respondents who lived with both their parents and their

children in one household, we found that the proportion of those who had never moved away from their parents' home exceeded 50% in all the years studied, and in the 2010s it even topped 60% (Table 1).

We also looked at how long the TGH lasts in an individual's life. Our data allowed us to examine a 15-year period, but we also considered several discrete periods. Only parents with children under the age of 25 in the household in all the waves were included in our analysis. We found that at each stage more than half (but less than 60%) of parents raising a child in a TGH were also in a TGH at the time of the next observation (see Table 2): Over 7(8) years, the figure fell to 40–50%; over (11)12 years it fell to below 40%. After 15 years, just under 30% of respondents remained in a TGH.

Table 1. Distribution of the middle generation living with their parents, according to how long they had lived in the parental home (in percentages).

	2004	2008	2012	2016
Never moved away from the parental home since birth	54.3	57.2	63.2	63.7
Moved back into parental home before first child born	17.4	10.4	12.7	9.7
Moved back into parental home after first child born	28.3	32.4	24.1	26.6
Total	100.0	100.0	100.0	100.0
N	260	228	253	173

Source: Author's calculations based on the Hungarian GGS, waves 2–5.

Table 2. The proportion of those staying in TGHs from one wave to another (panel data).

Years	$t \dots .t + 3(4); t \dots .t + 7(8); t + 11(12); t + 15$			
	2004	2008	2012	2016
2001	52.5	47.6	36.5	29.0
2004	—	58.7	42.3	31.6
2008	—	—	55.9	41.9
2012	—	—	—	55.1

Source: Author's calculations based on the Hungarian GGS, waves 1–5.

6. Discussion and Limitations

Our study deals with the prevalence of TGHs and with the macro- and micro-level factors that determine it. Our general finding is, that the TGH has declined over time overall, but that there was also a period when growth was measurable. The proportion of TGHs in society can be influenced by a number of things. Some macro-factors have an effect over a longer period of time, while others are of short duration. European examples and specifically the Hungarian example show that it is very difficult to measure the concrete impact of one factor, as several factors act at the same time. In general, we can state that the level of welfare in society affects the proportion of TGHs: We find fewer such living arrangements in richer nations. However, if it was the overall level of welfare that had the defining effect, the difference between Western and Southern European countries would be much larger, while the figures for Eastern and Southern Europe would be far more similar. The impact of economic recession cannot be clearly demonstrated everywhere, but it was measurable in the US and the United Kingdom. It is fair to assume that in Hungary the change of regime and the subsequent economic recession in the 1990s had a major impact on certain social groups and led to a bigger increase in the proportion of TGHs.

Among the macro-processes that determine the proportion of TGHs, we should definitely highlight the age structure of society: If the proportion of children (or the elderly) in society is very low, there is less chance of such living arrangements spreading. Whereas formerly the small proportion of the elderly acted as a kind of brake on the spread of TGHs today the declining trend for families to have children operates similarly.

The needs of young people obviously play a role in the formation of TGHs. This is clear from the fact that single parents and those with lower status (with lower education) are far more likely to live with their own parents than are other social groups. In order to determine at the micro-level whether the formation of a TGH is motivated more by the needs of the younger or the older generation, we should simultaneously consider the broader family and the characteristics of its members. Since we cannot do that, we are unable to quantify which generation's needs feature more prominently in the emergence of the three-generation living arrangement.

TGHs in Hungary are also strongly associated with a stage in life when the children in the family are toddlers. Alongside the fact that TGHs are significantly more common among single-child families, this suggests that in many cases such living arrangements are linked to the period of family formation, and are not a longer-term form of cohabitation. This also indicates that far more people live in a TGH at some point in their lives than cross-sectional studies would suggest. Our analysis of the GGS panel data also indicates this, although our findings are limited by the small sample size and other content constraints.

The prevalence of TGHs may be influenced by a number of factors that we have not measured. Perhaps the most important of these is the change in attitudes toward intergenerational cohabitation and the nature and strength of the intergenerational relationship. Hungary is a country with traditional values in many respects. Family relationships play a central role in the lives of Hungarians, but that does not necessarily mean that the different generations can live together.

Nor did we examine how the physical availability of potential grandparents can change from one social stratum to another: For example, poorly educated members of the oldest generation tend not to live so long, and so may not be around to participate in a TGH. A final limitation is that we do not have data on the change in spatial mobility, which also can have an effect on the prevalence of TGHs.

Our results have several implications: The first is that more complex research into the forms of coexistence of families with children is needed. In some social groups and in certain life stages, the proportion of TGHs is high. The living conditions and well-being of the grandchildren's generation are influenced not only by whether their parents live together, whether they live in a stepfamily, and how many siblings they have but also by whether they live with their grandparents. The second implication is that there can be several macrostructural changes that can affect the trend of the prevalence of TGHs. These changes can stop or even reverse the long-term processes. Economic crises, or crises like those of the early 2020s (Covid-19, energy crisis), can strengthen family cohesion and various forms of intergenerational cooperation, thus increasing the prevalence of TGHs. Following these processes could

contribute greatly to a more accurate picture of the factors affecting children's development.

Conflict of Interests

The author declares no conflict of interests.

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Part II.

Family Practices in Vulnerable Contexts

Article

Growing Pains: Can Family Policies Revert the Decline of Fertility in Spain?

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Abstract
This article aims to analyze the capability of family policies to reverse the sharp decline in fertility that has been observed in Spain in recent decades. The analysis was carried out by applying two mathematical techniques: the genetic algorithm and the strategic scenarios. Firstly, a mathematical model was designed and validated adjusting the combined performance of fertility and family policies during the 2008–2019 period. Subsequently, this model was applied to the future (2020–2060) to extrapolate the evolution of fertility considering different models of family policies. The results demonstrate that a model of family policies that is coherent with other socially desirable objectives, such as gender and social equality, will be insufficient to reverse the current downward trend in fertility. Therefore, these outcomes point to the need to articulate and harmonize diverse public policies considering the principles of equality and well-being to modify the recent decline in fertility. An increase in fertility must therefore be identified as a socially desirable goal and public policies must be adapted to this objective, in the understanding that fertility not only requires family policies but also their coherence with the employment and educational policies and work–life balance mechanisms offered by public institutions.

1. Introduction

This article aims to contribute to a line of research that analyzes the relationship between the fertility levels of a country and the existing family policies, providing new evidence to a field of study—the sociology of the family and population—that has a long academic tradition in the European context (see, for example, Gauthier, 2013; Lappegård, 2010; Thévenon & Gauthier, 2011).

The analysis is based on a structural perspective, in the understanding that public policies generate responses in citizens' behaviors and attitudes. Public policies thus constitute resources that influence families' decisions about whether and when to have children. Simultaneously, public policies provide symbolic messages to the population about collective goals and desirable objectives, and these public resources are key elements to advance towards these socially desirable goals. This is the case with increasing fertility rates and, more specifically, helping families to have the number of children they wish to have.

However, family policies do not operate in a vacuum but rather interact with the economic, cultural, and social context, and therefore they must provide coherent messages linking the desirable increase in fertility with other collective goals like gender equality or social cohesion (Szalma et al., 2020).

Based on these premises, this article aims to answer the following research question: Is it possible to modify the current downward trend in fertility through family policies? To respond to this question, our specific goal is to forecast what the trend in fertility rates will be in

the future (2019–2060) in Spain based on different scenarios of family policies. The mathematical techniques that were applied for this purpose are the genetic algorithm and strategic scenarios since both techniques allow the design of diverse combinations of family policies projected into the future. Specifically, three dimensions of public support for families have been taken into consideration: parental leaves (time), public pre-school services (education), and monetary transfers (money). In this way, this article tries to provide useful empirical evidence for policy-makers to design family policies, bearing in mind their impact on fertility.

2. Family Policies as Tools for Advancing Towards Larger Common Goals

2.1. The Lowest Low Fertility in Spain

Spanish women are among those who have the lowest number of children within the current European context of low fertility, a phenomenon that has been named the "lowest low fertility" (Billari & Kohler, 2004; Castro-Martín & Martín-García, 2016) and which constitutes a peculiarity shared with other countries in Southern Europe, such as Italy (Luppi et al., 2020). Certainly, Spain is one of the countries in the world with the lowest fertility (1.16 children per woman in 2021; see INE, 2021), which is partially explained by the delay in the decision to have children due to the perception that economic and social conditions are not favorable (Esteve & Treviño, 2019). Indeed, in 2021, the average age of motherhood stood at 32.6 years (INE, 2021).

In the current European context of continued fertility decline, a growing interest has been observed in studying the relationship between family policies and fertility levels, but so far no definitive conclusions have been reached (Neyer et al., 2013). Gender inequality has been identified as a determining factor in explaining low fertility rates, with fertility increasing when women share domestic and care tasks with men (Goldscheider et al., 2015). Along these lines, McDonald (2000) indicates that fertility decline is more evident when there is a conflict between the perception of gender equality and the possibilities offered by institutions to ensure that this equality is operationalized.

In the specific case of Spain, social research has analyzed the explanatory variables for this extremely low fertility, identifying, alongside the transformation of traditional family values common to other Western societies, specific elements in Spanish society such as job insecurity, housing problems, and unsatisfactory work–life balance mechanisms (Bueno & García Román, 2020; Castro-Martín et al., 2020; Gietel-Basten & Sobotka, 2020; Matsyak et al., 2021), as well as insufficient public aid and an erratic and incoherent architecture of family policies (Castro-Martín & Martín García, 2013; Castro-Martín et al., 2018; Esteve & Treviño, 2019; Moreno, 2008; Moreno Mínguez, 2013).

On the other hand, uncertainty constitutes an element with negative effects on fertility, since "historically, economic and health crises have never been preferred periods for a couple to decide to have a baby" (Luppi et al., 2020, p. 1340). In this sense, precariousness and economic insecurity have been significant obstacles to having children in Spain for decades (Esteve et al., 2021). These obstacles, together with the recent Covid-19 crisis and the current context of international conflict, configure a growing scenario of uncertainty and insecurity that aggravates the decline in fertility (Luppi et al., 2020; Sobotka et al., 2021).

In this sense, the low fertility in Spain contrasts with the number of children that Spanish families desire to have, which has remained stable at around two in recent decades and coincides with the ideal family size of other European countries (Castro-Martín et al., 2020; Sobotka & Beaujouan, 2014). This distance between the facts and the ideal aspirations shows that Spanish families are facing a material and welfare deficit that affects their family projects (Goldscheider et al., 2015; Raybould & Sear, 2021) and explains why an increase in fertility rates is a desirable collective goal.

Along similar lines, low fertility is also connected with other social challenges such as the adequacy of the current welfare state model to the new sociodemographic dynamics of population ageing, family diversification, and transformation of gender relations (Castro-Martín & Martín-García, 2016; Thévenon, 2011). From both perspectives—micro and macro—low fertility in Spain can be conceptualized as a tendency that needs to be reverted, given that it is a reflection of deficits on several levels.

2.2. Family Policies in Spain

Despite the fact that low fertility constitutes a collective problem, Spanish public policies reflect neither the commitment nor the intention to reverse this decline. Spain, framed within the Mediterranean welfare state (Ferrera, 1996), has traditionally been characterized by low public investment in family policy, with erratic and incoherent family policies (Castro-Martín & Martín García, 2013; Castro-Martín et al., 2018; Esteve & Treviño, 2019; Moreno, 2008; Moreno Mínguez, 2013). The Spanish political agenda has been dominated by partial initiatives by different governments that have not satisfactorily facilitated the entry of women into the labor market by guaranteeing effective work–life balance measures. Childcare has been channeled through family solidarity, either through the total or partial exit of women from the labor market or the support of grandparents—especially maternal grandmothers—which has traditionally been used as a frequent resource to balance work and care responsibilities (Tobío Soler, 2012).

The defamiliarization process has been promoted in recent years with family policies aimed at reducing family responsibility in regard to care (León et al., 2021), but the

outcome is yet insufficient and unsatisfactory for families, especially for those with fewer resources. Certainly, this converges with another feature of the Spanish care model: the high presence of private initiatives, either through the use of private pre-school services or hiring professional care providers as full-time or part-time caretakers (Elizalde-San Miguel et al., 2019; Silvestre, 2022; Tobío Soler, 2012).

This research focuses on family policies aimed at the stage 0–3 years and, based on the definition of family policies established by Daly and Ferragina (2018), the measures available have been classified into three broad categories:

- Policies defined as time, which are those intended to guarantee that children can be cared for by the parents in the first stages of their lives or if they are ill. Paid birth leave has been the only policy included in the Spanish case (with a maximum of 16 weeks for each, the father and the mother), although the Family Law currently being developed by the Spanish government is planning to introduce a new paid leave of seven days a year to care for children until the age of eight (Sosa Troya & Torres Menárguez, 2022).
- The offer of public pre-school services and the degree of coverage they entail with respect to the entire population aged 0–3 years old. In Spain, the coverage varies between regions because it is a competence delegated to the autonomous communities, although it is estimated that at the national level only 20% of children under three years of age attend public pre-school services. Nonetheless, this resource has been identified as an important equalizing resource, aiding the most vulnerable segments of the population to improve their social situation. There is therefore a wide margin for improvement in the provision of these services in Spain (Elizalde-San Miguel et al., 2019; Save the Children, 2019).
- Monetary benefits, which "represent society's recognition of the financial burden of maintaining a family" (Flaquer, 2000, p. 40). However, these resources have not been sufficiently developed in Spain to mitigate the high rates of child poverty (Jurado-Guerrero & Naldini, 2018). The Child Benefit is the only policy common to all regions in the country; it is an economic transfer of EUR 1,200 a year that is limited to families with employed mothers.

The Family Policy Index (XFPI) is a synthetic index that brings together, in a single value, the set of family support measures existing in a given country (Elizalde-San Miguel et al., 2019). Considering the three dimensions just mentioned, the XFPI places Spain around values of 0.2 out of 1, and points to clear deficiencies in the provision of resources together with the lack of coherence of public policies with other social objectives (Elizalde-San Miguel et al., 2019). There is, therefore, the potential for improvement to develop family policies in Spain, so that they become facilitating elements to achieve socially desirable objectives, understanding as such not only fertility itself but also gender and social equality or the reduction of child poverty.

Indeed, the concept of "family policy" is complex and incorporates diverse measures that might be ideologically opposed (Ayuso Sánchez & Bascón Jiménez, 2021; Comas d'Argemir et al., 2016; Flaquer, 2000). Traditionally, population policies had a pro-natalist perspective that considered women only as providers of children, above any other social role (Comas d'Argemir et al., 2016; Pérez Díaz, 2020). It was the incorporation of women in the labor market that generated a new social challenge: designing new instruments to guarantee childcare in the absence of traditional care providers, the mothers, giving space to new paradigms in the design of family policies. As such, family policies are very much linked with gender equality. In this regard, the Nordic countries were pioneers in designing a model of public policies with a gender perspective that today prevails as the most generous in Europe (Brandth & Kvande, 2018).

3. Methods

The analysis carried out in this article is located within the frame of mathematical sociology, a field of study that applies techniques from mathematics to shed light on complex social challenges that require multidisciplinary perspectives. This research aims to contribute to the study of family policies using two mathematical techniques: the genetic algorithm and strategic scenarios, two methodologies that allow us to predict the behavior of fertility based on different combinations of family policies. The usefulness of these two methods to analyze social problems has been proved in previous investigations (Caselles et al., 2020).

The methodological basis used for this analysis comes from two previous investigations:

- The XFPI, a synthetic index composed of three sub-indexes that mirror the three most common family policies: pre-school services index, parental leave index, and monetary transfer index;
- A demographic model that includes the variables related to family policies needed to obtain the XFPI and the following demographic variables: births, deaths, and emigrations and immigrations defined by gender and age. The usefulness of the model is validated by applying it to the past period, reflecting that the model fits and replicates the previous fertility behavior and family policies. Once the model was validated, it was projected into the near future to predict the forthcoming fertility behavior if the current family policy model is maintained. In this sense, the results indicate that the current

model of family policies is exhausted and proves insufficient to reverse the present decline in fertility (Díaz Gandasegui et al., 2021).

Based on the results obtained in these previous investigations, this article aims to contribute to this line of analysis by studying the impact that a different model of family policies would have on fertility depending on the generosity or precariousness in terms of public funding and the degree of coherence with other socially desirable goals previously identified, namely gender equality and the reduction of social inequality.

3.1. The Demographic Model

The design of the demographic model has been carried out based on the model mentioned above, designed by Díaz Gandasegui et al. (2021), with the introduction of two new features that improve the scientific soundness of that model:

- The XFPI has been improved by limiting the number of seats in public pre-schools to the forecasted population of children aged 0–2;
- The function that incorporates the Synthetic Fertility Index (XSFI) has been adjusted with higher precision to reflect recent trends in the age of maternity for the first child since maternity is being postponed significantly in Spain in the last decades. Indeed, every three years the average age of maternity in the first child is delayed by approximately 1.5 years. Consequently, the initial function needed to be modified.

With these two modifications, the demographic model was validated in the period 2008–2019 for the set of input variables. First, the adjustment of the input variables was done through mathematical equations that allow adjustment of the behavior of the historical data in the mentioned period (shown in Annex 1 of the Supplementary File). Once the input variables were adjusted, the mathematical model was validated in two

ways (see Figure 1): through the visual representation of the two trends, the historical-real one (in points) and the tendency simulated by the model (in line), with both trends evolving equally, reflecting the validity of the model; and through the value of R^2, which in both cases is high. Both validation methods—visual representation and R^2—show that the model fits with precision the real behavior of the output variables. Figure 1 represents the validation of the model to the XSFI and the XFPI. The validation of the other output variables related to the demographic variables is included in Annex 2 of the Supplementary File.

Once the model is validated, it is considered valid to be applied for the forecasting methods, the genetic algorithm and the strategic scenarios.

3.2. Optimization of the Synthetic Fertility Index (2020–2060)

As stated earlier, the goal of this research is to find the best combination of family policies to achieve the highest possible fertility, taking into consideration that current fertility rates are lower than families' real desires. Consequently, the optimization of the XSFI was carried out using the genetic algorithm and strategic scenarios, two different forecasting techniques that not only predict the evolution of fertility rates in the future but also identify the changes necessary in the design of family policies to reach the maximum fertility level.

The genetic algorithm is automatically programmed in SIGEM, the simulation mathematical software. Genetic algorithms allow optimizing, at each moment, the previously defined target variable (in this case, fertility), named objective variables (OBJE), based on other variables included in the demographic model (in this case, family policies), identifying the maximum possible value that can be achieved in each year. Hence, the equation calculated by OBJE is:

$$OBJE = -XSFI$$

The simulation with genetic algorithms requires three reference values for each input variable: minimum,
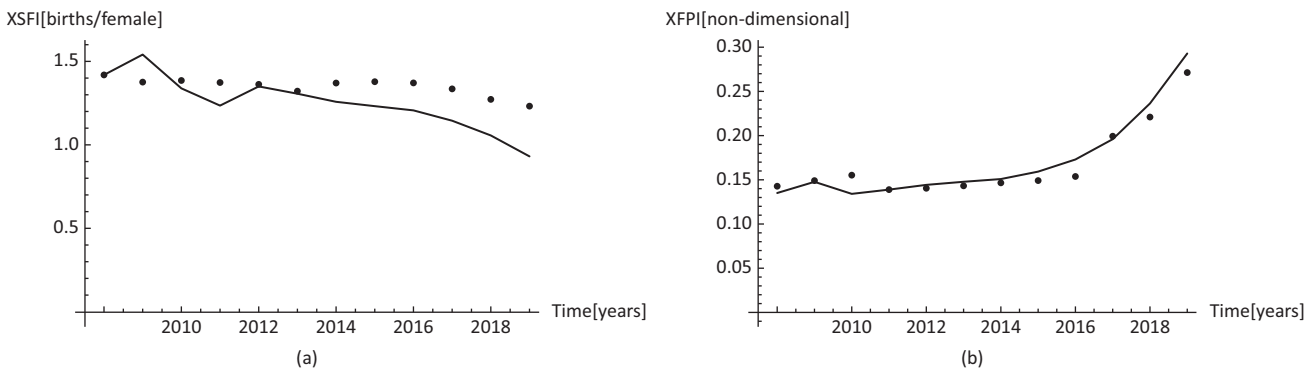
Figure 1. Validation of the model (2008–2019). Notes: (a) XSFI, R^2 = 0.79087; (b) XFPI, R^2 = 0.972928; the points indicate historical values and the lines indicate simulated values.

maximum, and an annual variation window (AVW). These reference values can be obtained in different ways; in this study, we have used two methods to generate two genetic algorithms. Genetic Algorithm 1 (GA1) is a "free scenario" in which the only limitations are pre-existing reference values, identified from the previous period and/or place. Genetic Algorithm 2 (GA2) has been labeled as "intentional," and, in this case, experts define the reference values based on the existing findings in this field of study.

The second forecasting technique, the strategic scenarios, requires extrapolating all input variables which are temporarily defined. EXTRAPOL is the tool that allows the extrapolation of the future trend of the input variables taking as a reference a confidence interval—maximum and minimum values—from a function previously obtained with REGINT. It should be noted that input variables are classified into two types: (a) control variables that can be modified by policymakers (an example would be the number of public places available in pre-school services), and (b) scenario variables, which are the ones that cannot be controlled by policymakers. All the input variables used in this study are control variables.

The strategic scenarios are designed considering the possible alternative strategies to be designed in family policies directed at families with children in the stage 0–3 years old. This technique allows us to observe the potential impact these different strategies will have on the evolution of fertility and the OBJE. In this way, the strategies are defined on the control variables.

The family policies included in these two techniques are those integrated into the XFPI. They do not cover the whole range of existing family policies but those that are most common in European countries and therefore allow comparative research.

3.3. Simulation of Fertility Using Genetic Algorithms

The first scenario generated by the model, GA1, was identified as a "free" scenario, which seeks to determine the best combination of family policies without explicitly introducing any intentionality in terms of coherence with other collective goals. In this case, the reference values have been obtained from Spain and Norway during the period 2000–2018. Based on these reference values (Table 1), the simulation software seeks the best combination of family policies that will lead to the maximum fertility rate.

The second scenario, GA2, was identified as "conditional/intentional." This scenario seeks, like the previous one, to maximize the target variable—fertility—but, in this case, the minimum and maximum reference values were defined by experts considering the current context and also its coherence with other socially desirable values. The difference between the two genetic algorithms is the conditionality or unconditionality of the optimization with a context of values that, in the case of GA2, guarantees coherence between increasing fertility and social and gender equality. Therefore, the values provided as a reference (Table 2) are defined considering the optimization of fertility from a perspective of gender equality and social cohesion. Hence, this second algorithm ultimately constitutes the moment of greatest dialogue between mathematics and sociology, as the techniques and data provided by the former converge with the necessary interpretation and contextualization of the latter.

The criteria used to define the minimum and maximum values of the GA2 were as follows. In relation to paid birth leave, the values provided incorporate a gender equality perspective. It is considered that: (a) both parents must have the same number of days,

Table 1. Reference values for the GA1.

Chromossome	Variable	Initial value	Min	Max	AVW (%)
1	Purchasing power parity (XPPP)	0.631	0.5	1	5
2	Simultaneity or not of the parental leaves (OVLP)	0.01	0.01	1	20
3	Days of parental leave corresponding to mothers (DMAL)	112	112	240	20
4	Divisible part of the parental leave (DPLS)	0.01	0.01	350	300
5	Length of Child Benefit (TICB)	1,095	30	1,095	60
6	Coverage of Child Benefit (XCCB)	0.6927	0.01	1	60
7	Monetary value of Child Benefit in PPP (ECCB)	100	100	1,000	20
8	Length of Cash for Care (TICC)	0.01	0.01	1,095	200
9	Monetary value of Cash for Care in PPP (ECCC)	0.01	0.01	6,000	200
10	Monetary value of Birth Grant in PPP (ECBG)	0.01	0.01	2,500	200
11	Coverage of Birth Grant (XCBG)	0.01	0.01	1	10
12	Public places in public schools (XPUB)	214,356	30000	500,000	10
13	Days of parental leave corresponding to fathers (DFAL)	28	28	240	20

Notes: The AVW sets a limit in the annual oscillation to avoid sudden jumps in the trend; Annex 3 of the Supplementary File includes the complete list of variables.

Table 2. Reference values for the GA2.

Chromossome	Variable	Initial value	Min	Max	AVW (%)
1	Purchasing power parity (XPPP)	0.631	0.5	1	5
2	Simultaneity or not of the parental leaves (OVLP)	0.01	0.01	1	20
3	Days of parental leave corresponding to mothers (DMAL)	112	112	240	20
4	Divisible part of the parental leave (DPLS)	0.01	0	0	10
5	Length of Child Benefit (TICB)	1,095	1,095	1,095	10
6	Coverage of Child Benefit (XCCB)	0.6927	0.7	1	10
7	Monetary value of Child Benefit in PPP (ECCB)	100	100	300	15
8	Length of Cash for Care (TICC)	0.01	0	0	10
9	Monetary value of Cash for Care in PPP (ECCC)	0.01	0	0	10
10	Monetary value of Birth Grant in PPP (ECBG)	0.01	0.01	2,500	60
11	Coverage of Birth Grant (XCBG)	0.01	0.01	1	10
12	Public places in public schools (XPUB)	214,356	208,516	1,200,000	20
13	Days of parental leave corresponding to fathers (DFAL)	28	112	240	20

Note: The list of variables is included in Annex 3 of the Supplementary File.

the minimum being 112 days and the maximum 240, a reference value taken from Sweden; (b) the transferability of the leave is eliminated, understanding that the days assigned to each parent should respond to a "take it or lose it" logic (minimum value = 0) or could only exist when there is a quota for both (maximum duration of the total leave of 480 days, with a mother's quota of 112 days and a father's quota of 112 days); (c) simultaneity ranges between values of 0 (*simultaneous*) and 1 (*not simultaneous*). With regard to pre-school services, the minimum value is the number of places existing in the last year and the maximum number of places is the foreseen number of children with 0–3 years of age (adjusting this value to the duration of birth leave, as it is a stage during which these services are not used). GA2, therefore, seeks universality. Finally, the values of the cash transfers meet the following criteria: The Child Benefit would range between the current value and a maximum of EUR 300 per month and its coverage would be universal (currently it is only for employed mothers). Likewise, the Birth Grant, existing in Spain between 2007 and 2010, would be resumed, with a lump sum at the birth of EUR 2,500 and universal coverage.

3.4. Simulation of Fertility Using Strategic Scenarios

The six strategies that are foreseen as possible future developments of family policies in Spain correspond to different models that could come into being depending on the decisions that future policymakers adopt in this area:

- Strategy 1: Maintenance of the current situation, characterized by being a scenario in which family policies have not managed to stimulate or maintain previous fertility levels.

- Strategy 2: Policies aim at increasing parental leave, but the rest of the sub-indexes (services and money transfers) remain unchanged. This strategy would complete the recent trend of increasing parental leave that has occurred in Spain. Thus, the days of birth leave for both parents would increase, similar to the duration of the most generous countries in Europe. The model designed consists of non-transferable leaves, based on empirical evidence that has demonstrated that non-transferability and the so-called "fathering alone" model, that is, no overlap in time when taking the birth leave, is a measure that contributes to parental involvement and gender equality in regards of care and home task distribution (O'Brien & Wall, 2017).

  ○ Total duration of parental leave (DMAL + DFAL) increases to 240 days. DMAL and

- Strategy 3: Policies aimed at leave and pre-school services increase, but monetary transfers remain unchanged. This strategy includes a design of leave with a gender equality perspective and universal places in public pre-schools services to guarantee access to this educational stage for the entire population aged 0–3.

  ○ Total duration of parental leave (DMAL + DFAL) increases to 240 days. DMAL and DFAL are not concurrent (OVLP goes from 0 to 1).
  ○ Number of seats in public schools (XPUB) increases from 208,516 places to a maximum scenario in which XPUB is equal to the total number of children aged 0–2, reaching universality.

- Strategy 4: Places in pre-school services increase, but leave and monetary transfers remain unchanged. In this model, priority would be given to educational services.

  - Number of seats in public schools (XPUB) increases from 208,516 places to a maximum scenario in which XPUB is equal to the total number of children aged 0–2, reaching universality.

- Strategy 5: Monetary transfers are increased aimed to reduce child poverty, but the rest of the policies remain unchanged. In this scenario, the Birth Grant would be recovered and the Child Benefit would be universal, eliminating its current conditional nature, as is nowadays only for employed mothers.

  - The amount of the Child Benefit (ECCB) increases from EUR 100 to EUR 300 throughout the 0–3 period and with universal coverage (XCCB).
  - The Birth Grant (RBIG) is resumed with the previous conditions, a lump sum of EUR 2,500 euros, and with universal coverage (XCBG).

- Strategy 6: Designs a scenario in which all the policies increase simultaneously. In this strategy, all the new values for the variables mentioned in the previous strategies are incorporated.

As mentioned above, these different scenarios have ideological connotations and reflect diverse perspectives on social and gender equality, so their impact should not be analyzed solely in terms of fertility, but also regarding other dimensions. The complete list of input control variables is listed in Annex 3 of the Supplementary File.

4. Results

4.1. Expected Trends in Fertility Rates Applying Genetic Algorithms (2020–2060)

The results obtained from the application of the two genetic algorithms and the strategies designed in public policies to modify the evolution of fertility in the period 2020–2060 are presented below. Figure 2 shows how each of the policies—input variables—will evolve to achieve the maximum possible fertility according to GA1 ("free") and GA2 ("intentional"). It must be noted that when both algorithms coincide the figure seems to reflect just one since both trends overlap.

The analysis carried out using the two genetic algorithms makes it possible to identify which model of family policies—GA1 (free) or GA2 (conditioned to gender and social class perspectives)—would produce a higher increase in fertility.

In relation to the policies included in the parental leave sub-index, both genetic algorithms agree on two elements: They consider positive, in terms of fertility, the simultaneity of the mother's and father's birth leaves (OVLP) and they also identify the relevance of increasing the maternity leave (DMAL) up to double the current one, that is, from 112 to 240 days. Nonetheless, they show differences with respect to the father's leave (DFAL): The GA2 considers it is positive to increase the leave of the father to the level of the mother's leave, while GA1 does not contemplate the equalization of leaves. Both algorithms, in short, point to the need to increase the total duration of parental leave, but the unequal distribution in terms of gender proposed by GA1 would make it difficult to move towards a model of co-responsibility and paternal involvement that requires a parental leave design known as "fathering alone" (O'Brien & Wall, 2017).

With respect to monetary transfers, the two genetic algorithms propose different scenarios. They both identify that it is beneficial in terms of improving fertility rates to increase the amount assigned by the Child Benefit, but GA1 proposes reducing its duration and coverage significantly, which would actually imply a decrease in female employment, as it currently depends on the employment status of the mother. This model is intended to boost fertility by adopting traditional gender roles in which gender inequality is assumed and care is delegated to the mother. Likewise, GA1 proposes to re-introduce policies that have already disappeared or have not existed in Spain, such as the Birth Grant and Cash for Care, a monetary transfer that is given to families who decide not to enroll their children in pre-school institutions, a measure which is controversial in countries such as Norway as it is normally used by vulnerable segments of the population and constitutes a barrier to early schooling, reproducing existing inequalities (Aassve & Lappegård, 2009).

Finally, with regard to the provision of public schools for children aged 0–2, GA1 may seem to offer a higher number of seats in public schools. However, this initial interpretation needs further clarification. XPUB, defined as the number of seats offered in public schools, has a limit: the total number of children aged 0–2 since it would make no sense in offering more seats than children. Thus, the apparently higher provision offered by GA1 needs to be analyzed with the data shown in Figure 3, showing the coverage of pre-school public places existing for the total number of children aged 0–2.

Figure 3 shows that indeed the coverage of XPUB is significantly lower under GA1, since the total number of children (XCHI) is higher than the offer of seats in public schools (XPUB), whereas both data (XCHI and XPUB) are coincident under GA2, meaning universal coverage. It is important to remember that pre-school seats are the most useful resource for achieving a satisfactory work–life balance and enhancing gender and social equality, elements which help to increase fertility and fulfill other aforementioned social demands (Sanz et al., 2019).
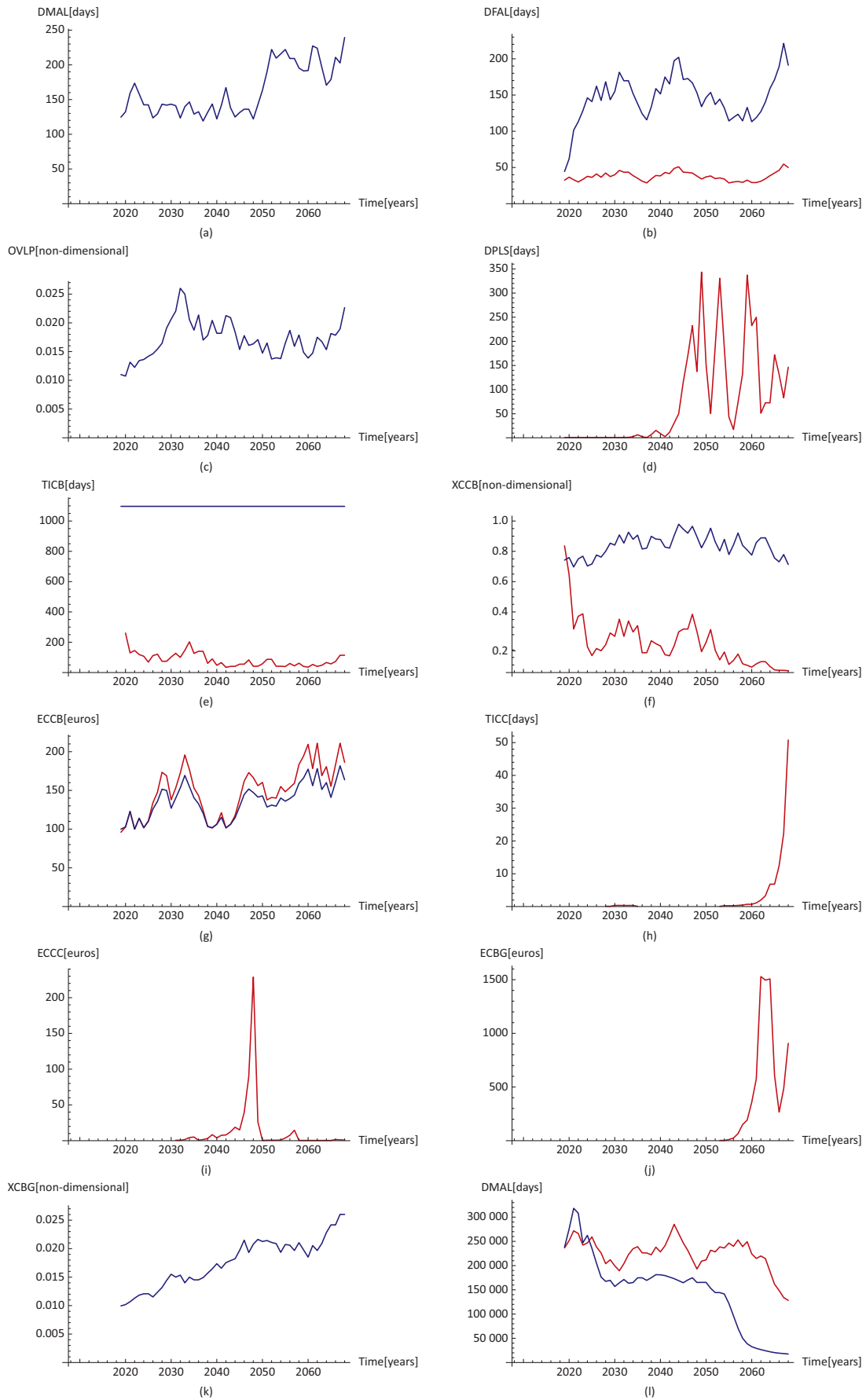
Figure 2. Future simulation (genetic algorithm) of family policies (disaggregated): Spain, 2020–2060. Notes: The GA1 (free) is presented in red and the GA2 (conditional on goals consistency) is presented in blue.

XCHI[blue]/XPUB[red]

XCHI[blue]/XPUB[red]

(a)

(b)
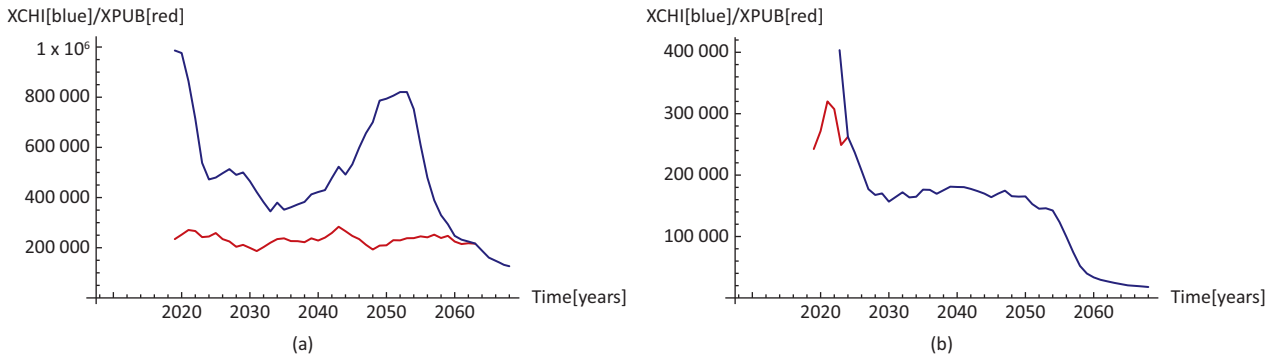
Figure 3. Future simulation (genethic algorithm) of XCHI and XPUB: Spain, 2020–2060. Notes: (a) GA1 (free) and (b) GA2 (conditional on goals consistency).

These results show that the algorithms designed in this research reflect the intentionality of the policies in the different models considered. In this sense, GA2 incorporates gender and social equality in the proposal and consequently mirrors recent trends in fertility rates in Spain, while GA1, in which there is no explicit intentionality in the target, represents reference values provided from past periods when family policies were designed based on traditional gender roles.

Based on the evolution of family policies proposed by each of the algorithms, Figure 4 shows the future evolution of fertility depending on the model of family policies, measured with the XFPI.

Furthermore, the results obtained from the future extrapolation of the two genetic algorithms show that GA1 foresees the potential boost in fertility associated with an archaic model of family policies, based on an involution in terms of gender equality. Moreover, GA2 represents the other side of the coin, as it predicts that a significant increase in investment in family policies would not be sufficient to reverse the current decline in fertility.

4.2. The Expected Evolution of Fertility Rates Applying Strategic Scenarios (2020–2060)

Figure 5 shows the impact on fertility of the six strategies defined above with diverse evolutions on the set of family policies.

The six strategies designed oscillate between stagnation in the current model of family policies and different versions of growth and development of family policies, strategies that would imply a very uneven growth in terms of the Family Policies Index and, ultimately, of public investment. However, despite the diversity of scenarios in family policies, none of the outcomes represents a significant increase in fertility; they all forecast a future sharp decline in fertility rates, as can be observed in the first part of Figure 5. This trend indicates that reversing the current—and already prolonged—decline in fertility requires collective solutions that are beyond public policies aimed at families.

The model used incorporates family policies but does not include other structural barriers that have been mentioned at the beginning of this article as determinants of fertility, such as the instability of the labor market, the lack of work–life balance resources, or, more recently, the scenario of uncertainty provoked by international conflicts and the pandemic. In this sense, it is worth noting the slight recovery in fertility that is being observed in the Nordic countries after the Covid-19 pandemic is probably explained by the increasing support received by families to care for minors in a critical context, in which work and care conditions had to be adapted to the socio-sanitary requirements. These measures generated confidence in the citizens in the public support provided to develop their vital projects and also reduced

XSFI[children per women]

XFPI[non-dimensional]

(a)

(a)
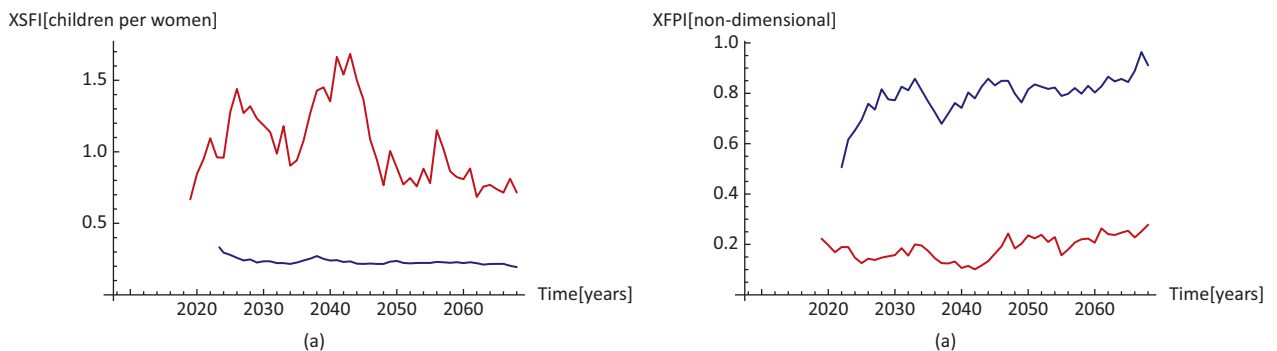
Figure 4. Future simulation (genetic algorithm) of fertility and the Family Policies Index: Spain, 2020–2060. Notes: The GA1 (free) is presented in red and the GA2 (conditional on goals consistency) is presented in blue.
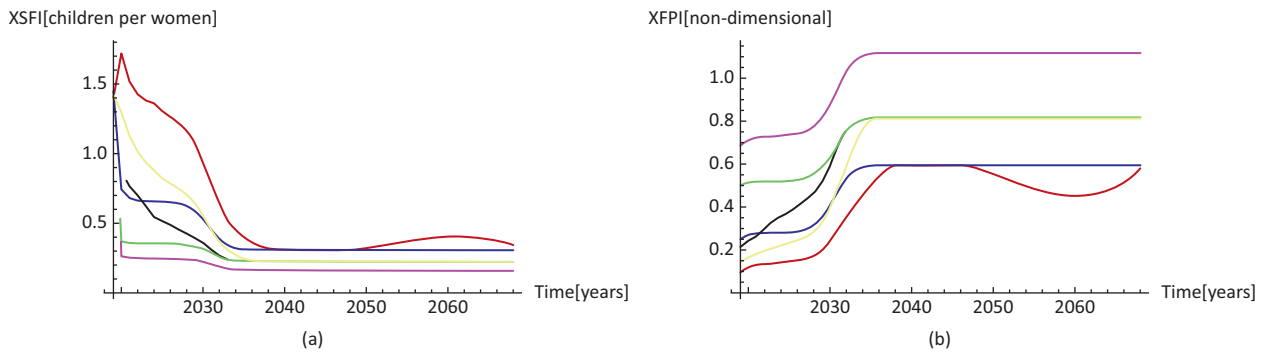
Figure 5. Future simulation (2019–2060) of fertility in Spain depending on different strategies. Notes: The red line represents Strategy 1; the black line represents Strategy 2; the green line represents Strategy 3; the blue line represents Strategy 4; the yellow line represents Strategy 5; the purple line represents Strategy 6.

uncertainty against a background of risk, ultimately influencing the decision to have children (Lappegård et al., 2022; Nisén et al., 2022). The inadequacy (or absence) of these measures in Spain certainly explains the limitations that the family policies included in this research face to become drivers to reverse the acute fertility decline that this country is experiencing.

5. Conclusions

Family policies have the capacity to generate social change processes in matters that are socially useful and which constitute social commitments, such as gender equality or the reduction of social inequality. Their development is therefore a positive goal in itself, regardless of the impact they may have on fertility.

The results of this research reflect, ultimately, that the use of mathematical models in the design of public policies requires a rigorous approach and awareness of the intentionality associated with those models. In this line, GA1 is effective in terms of increasing fertility rates but nonetheless represents a very significant regressive scenario in terms of gender equality. The outcome of the scenarios in which family policies move towards a more equal society shows that the decline in fertility will not reverse. Nonetheless, this apparently contradictory situation in terms of fulfilling social demands might find a solution if there were a reduction in uncertainty and an enhancement of citizens' well-being. This article shows how family policies seem insufficient to reverse declining fertility trends, and the outcomes obtained may be useful to redesign the conditions offered to families by public institutions to compensate for growing contextual risks. Certainly, the context of social, political, and economic uncertainty has increased in recent years with a pandemic, climatic and economic crises, and wars, but the institutions have not been able to cushion the effects of these contingent events to provide favorable circumstances for having children.

Indeed, Spanish society is making significant progress towards equality, but other objectives, such as family satisfaction and well-being, seem to be suffering noteworthy setbacks in recent years. This is reflected in the widening distance between the number of children families desire and the children they actually have. Although this gap is not always visible, it represents the existence of material limitations or shortcomings in public resources that prevent families from developing their life projects. The decline in fertility is undoubtedly a social problem that affects Western societies at large in the progressive process of ageing. But families too, at a micro level, demonstrate that their desires are gradually diverging from reality.

New social policies are needed to improve social equality and also increase fertility. Otherwise, the apocalyptic scenarios indicated by the mathematical models used in this research could lead to dystopias that we only know today through the metaphors provided by fiction, which activates latent social fears concerning the absence of births. In this sense, *The Handmaid's Tale*, a novel written by Margaret Atwood in 1985 that has been successfully adapted to a television series, reflects these anxieties together with the involution of social equality. Therefore, this research should prompt us to rethink the current situation and avoid moving along a path that we already know, translating our fears into a real scenario.

The results of this research provide new empirical evidence, applying an innovative methodology, to the field of study of family policies, challenging us to reconsider the current architecture of resources offered to families to reverse the decline in fertility and move towards a more equal society.

However, it is important to point out the limitations of the analysis carried out: The demographic model is fed with a specific—and limited—menu of family policies to facilitate international comparison, but it might integrate additional family policies; also, the study is restricted to the period when children are aged 0–3 years old but this period might be expanded to show different approaches towards work–life balance that may influence reproductive decisions. This article proposes to open future research lines related to the above limitations, incorporating new input variables in the model,

such as issues related to the functioning of the labor market or income-related inequalities, among others.

Conflict of Interests

The authors declare no conflict of interests.

Supplementary Material

Supplementary material for this article is available online in the format provided by the authors (unedited).

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Article

Family Climate in Pandemic Times: Adolescents and Mothers

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Abstract
In this article, we examine changes in family climate during the first Covid-19-related lockdown in Germany. We compare the perspectives of mothers and adolescents to explore whether the factors of perceived changes in family climate are systematically and significantly different between these groups. We measure family climate as positive emotional climate, a sub-dimension of the family environment scale, to capture a feeling of cohesion and emotional openness within the family. Based on family system theory and the family stress model, we expect an overall deterioration in family climate due to increased environmental adaptation in the pandemic. Furthermore, we expect family climate to deteriorate less when families have economic and social resources available. On the other hand, we assume that being employed and/or primarily responsible for family care relates to a stronger decline in the family climate. We employ longitudinal survey data (AID:A) from around 300 German families with children aged nine to 17 and apply individual fixed effects models to investigate changes in family climate from 2019 to 2020. Almost half of our respondents report a decrease in family climate. For mothers, the share of unpaid care work at home is the only significant predictor: Mothers doing more than 80% of the chores and childcare feel a greater decrease in family climate. For adolescents, however, being at risk of poverty and having less frequent family activities are important predictors of stronger decreases in family climate. In summary, our results illustrate the relevance of distinguishing between the perspective of children and parents in family studies.

Issue
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1. Introduction

Over the course of the Covid-19 pandemic, which struck in early 2020, families have been regularly subject to stress as they attempt to deal with health threats and adapt to restrictions on public and private life. Closures of schools and daycare but also leisure facilities and associations, contact restrictions, domestic quarantine, and work and schooling from home have affected families' everyday experiences. In this study, we are interested in the consequences of these adaptation processes for the family itself, especially regarding how family climate,

that is the feeling of belonging together and emotional openness, has changed with respect to pre-pandemic states. Do parents and their (adolescent) children differ in their perspective on family climate? What factors may protect against deteriorating family climate under pandemic circumstances?

For Germany but also for other countries, the Covid-19 research concerning families centers on parental care work division and parental well-being. With respect to the former, most evidence points toward increased childcare hours for both mothers and fathers during the first pandemic lockdown, while the division of

childcare and housework in the parental couple did not persistently change with mothers shouldering most of this work (e.g., for Germany see Boll et al., 2021; Jessen et al., 2022; for Spain see Farré et al., 2022; for Italy, UK, and the US see Biroli et al., 2021). In light of these, several studies found a decrease in mental well-being, general life satisfaction as well as in satisfaction with work and family life in Germany (Huebener et al., 2021; Möhring et al., 2021) and across Europe (Biroli et al., 2021; Brodeur et al., 2021). However, the crisis has not affected everyone equally (e.g., Pailhé et al., 2022). Empirical evidence on well-being and life satisfaction points toward overall decreases in well-being with larger declines for mothers than for fathers (e.g., Etheridge & Spantig, 2022; Huebener et al., 2021; Zoch et al., 2021).

Evidence of how family climate is perceived by parents and children during the pandemic is relatively rare. German studies concerned with parents focus on satisfaction with family life (Huebener et al., 2021; Möhring et al., 2021; Zoch et al., 2021) or conflicts within the family (Langmeyer et al., 2022). These studies show important heterogeneities with stronger decreases in family satisfaction for individuals with (especially younger) children relative to childless adults and particularly mothers. Most of these studies find that the family's socioeconomic status or financial and housing situation play a role in moderating the negative effects. A number of German studies concerned with children and adolescents have investigated (mental) well-being or family climate. Concerning the latter, up to 50% of children and adolescents report experiencing a deterioration in family climate and more frequent conflicts during the first lockdown in the spring of 2020 (Ravens-Sieberer et al., 2022; Reim et al., 2022). Similar scenarios have also been observed in the international context (Biroli et al., 2021).

However, the crisis has also offered positive aspects for some families: Up to 25% of children and adolescents report an improvement in the atmosphere at home during the first lockdown; that is, they reported having more fun with the family and felt an improved family climate (Reim et al., 2022). Similarly, half of the families in France with a primary-school-aged child navigated the first lockdown with little impact on family well-being (Pailhé et al., 2022), and especially mothers reported an improvement or increase in stability in their relationships with their children during that period in the UK (Benzeval et al., 2020; Perelli-Harris & Walzenbach, 2020).

We contribute to these strands of the literature by directly comparing adolescents' and their parents' (i.e., mothers') perspectives on pandemic-induced changes in family climate. This allows us to investigate whether the factors of perceived changes in family climate are systematically and significantly different between mothers and adolescents and in which way. It also allows us to explore within-family differences of decreases in family climate, which is a unique feature of our study. Additionally, we provide a methodologically robust analysis employing panel data with base outcomes measured before the

Covid-19 pandemic. This means we do not need to rely on retrospectively reported changes (as, for example, in Reim et al., 2022). Furthermore, we evaluate changes in the short- to medium-term (i.e., four to five months) after the first Covid-19 lockdown in Germany rather than in the immediate impact of the first lockdown (as in most of the previous literature).

2. Theory

Our study focuses on changes in family climate during the pandemic. The family climate (and similar concepts) is consistently employed in diagnostic psychology (Hamilton & Carr, 2016) and is based on solidarity (cohesion), emotional openness (expressiveness), and the likelihood of conflict among family members. In the psychological literature, a positive family climate is understood as a preventive factor against, for example, child abuse (Glaser et al., 1993), bullying (Perren et al., 2009), or internet addiction (Yen et al., 2007), which makes it so important for family research. Importantly, family cohesion is often seen as a protective factor against the physical and psychological stress caused by the Covid-19 pandemic (Behar-Zusman et al., 2020; Prime et al., 2020). Here, we measure family climate as a positive emotional climate—one of the three subdimensions of the family environment scale (Moos, 1974; for German see Schneewind, 1988)—to capture the internal stability and cohesion of the relationships between family members. In this sense, a strong family climate is characterized by a strong sense of belonging to the family as a social group. Expressing one's feelings and perspectives is just as much a part of everyday interactions as treating each other with respect, even in conflict situations. In contrast, in families with a low family climate, problems and related emotions are rarely discussed openly, so conflicts tend to persist and family life is experienced as more stressful (Schneewind, 1988). In a recent study, Gomez-Baya et al. (2020) use data from the Children's Worlds project to show that family climate is significantly correlated with general life satisfaction for adolescents. However, correlation coefficients reaching from 0.36 to 0.56 per country indicate that family climate and life satisfaction represent related but different concepts. The question of who belongs to the family depends on the individual actors and the current situational framework (Morgan, 2011). Family events, rituals, shared knowledge about the family, or the naming of people and roles, for example, serve as integrative practices that distinguish family members from non-members (Finch, 2007; Galvin, 2006) but also within families the particular family members do not necessarily participate in these practices in the same way. Parents and children in particular thus can have different perspectives on their family and its climate (Schneewind, 2001). The classic family stress model refers to these different positions within the family system as it assumes, for example, that economic pressure can affect the

child's well-being by putting direct pressure on the parents in the first place and deteriorating the couple's relationship. The parent–child relationship then worsens, mediated by a deteriorating couple relationship and worsening parenting behavior, so the child also experiences pressure to adapt and may react with behavioral disorder (Conger et al., 2002). Thus, in this study, we investigate how family climate has developed during the pandemic in order to better assess possible long-term consequences for families' resilience. In the following, we investigate how parents and adolescents were affected differently by the pandemic, which can give indications of different needs. Therefore, we refer to family system theory and theories on social groups, gender, and social inequalities to propose hypotheses on what factors may be associated with changes in mothers' and adolescents' perception of family climate during pandemic times.

2.1. Why We Expect Family Climate to Deteriorate

Family system theory (Carr, 2015; Cox & Paley, 2003) understands the family as a social system within a larger environment (Bronfenbrenner, 1986). The family system alternates between states of internal stability and external adaptation (Cowan & Cowan, 2012). In the case of an external shock—here, the pandemic—the family system spends more energy to adapt to the changed environmental circumstances. Existing routines, rituals, and roles within the family system break up and re-stabilize in a new form. As the family is built on such institutionalizations through regular interactions (Berger & Kellner, 1964; Morgan, 2011), we expect family climate to worsen, at least temporarily, for both mothers and adolescents (Prime et al., 2020). As family stress theory (Conger et al., 2002) describes that stress factors originating from the family environment affect not only the family member that has to deal with that factor in the first place, but also spreads through the family system via family relationships. Thus, we expect all family members to be affected by the same resilience and risk factors although for different reasons, which leads to the first hypothesis:

> H1: Overall, family climate decreases due to increased environmental adaptation to pandemic circumstances.

2.2. Does the Omission of Joint Family Activities Reinforce the Pandemic-Induced De-Stabilization of the Family?

According to research on the constitution and cohesion of social groups, primary groups such as families and peer groups (Cooley, 1909) define shared goals to generate high levels of social interaction. This results in a feeling of a shared identity and group membership and draws symbolic boundaries that separate the group from its environment (Homans, 1962). Families, as an example of smaller groups, emphasize the individual character of their members and their unique group composition. Furthermore, the specific history and assumed continuation of family interactions are important pillars of the genesis and reception of the family as a social group (Tyrell, 1983). For instance, Hill's (1988) attachment hypothesis points to the amount of shared leisure time enjoyed by married couples as a predictor of lower levels of marriage dissolution within the subsequent five years of the first survey wave. Referring to Hill (1988), Roeters et al. (2010) find that mothers and fathers similarly report enjoying better relationships with their children with more frequent engagement in joint activities. As the pandemic came along with multiple restrictions regarding leisure activities, families may have adapted their routines by canceling well-established practices and adding new ones. Therefore, we further expect for both mothers and adolescents that:

> H2a: The family climate decreases more strongly the more family activities decrease.

To some extent, family system theory rejects the one-directed interpretation of H2a that family climate decreases only when family activities decrease as well. Contrary to H2a, it could be expected that every change in family practice comes with a decrease in family climate, as every change entails an adaptation process, regardless of the direction of change.

> H2b: The family climate decreases more strongly the more family activities change, regardless of the direction of change.

2.3. Can Social or Socio-Economic Resources Buffer the Destabilization of Families?

According to the capability approach (Sen, 2001), social and economic resources affect individuals' scopes of action. As described by Kuklys (2005), higher income is systematically correlated with higher income satisfaction, which indicates a better availability of capabilities due to a higher income level. We extend this interpretation in two ways. Following family stress theory (Barnett, 2008; Prime et al., 2020), we assume that social and economic resources affect not only individuals but also families as social groups. While certain family members might experience stress factors initially in other microsystems besides the family, they spread this factor within their family by sharing the consequences of these factors and their personal feelings with other family members. Available social and economic resources represent resilience factors helping all family members to cope with external stress factors. Additionally, we suggest that not only the family income, but also social-, status-related-, and digital infrastructure resources might enable capabilities to establish and

maintain family climate, for example, by keeping stress levels low, or by enabling the purchase of family support services or finding new opportunities for joint family activities. Regarding the economic resources, we can assume that the closure of schools and leisure facilities represents a material loss (e.g., of planned meals, spare time activities) that has to be compensated for by personal financial expenditure. On the other hand, shifting schoolwork to home introduces new material, spatial, and technical demands in the home, which specifically concern the availability of a suitable workspace and suitable equipment. In low-income households, in particular, we suspect that adapting to these requirements is associated with greater difficulties (Bujard et al., 2021; Sachser et al., 2021; van Lancker & Parolin, 2020). Additionally, social support might not only affect parents needing instrumental help to, for example, organize child caring (Pustulka & Buler, 2020), but also adolescents when they need to cope with constrained opportunities to meet friends (Settersten et al., 2020; Wang et al., 2022). However, Knabe et al. (2021) show that the impact of families' social networks in providing social support was significantly reduced by contact restrictions during the first lockdown. Moreover, adults with a higher educational background have a higher chance of working from home during the pandemic (Alipour et al., 2021). On the one hand, this reduced the risk of unemployment or reduced income stressing the family in total. On the other hand, working from home might have enabled parents to better care for their children and assist them in doing school from home. In detail, we expect for both mothers and adolescents:

> H3: The family climate decreases less when families have higher levels of (a) economic, (b) social support, (c) educational, and (d) digital infrastructural resources available.

2.4. Are Double-Burdened Mothers Exposed to Greater Dips in the Perception of the Family Climate?

Family stress theory (Conger et al., 2002) points to the relevance of the individual positions and relationships of family members in transmitting external shocks into the family system. As the political constraints during the pandemic have mostly affected employment, educational, family, and spare time practices, persons in particular who are involved in a number of these systems have to adapt. Thus, we expect mothers to experience a stronger decrease in the family climate when they are employed and responsible for doing the chores and care work at home. Furthermore, Germany still constitutes a modernized male breadwinner system in which traditional gender roles structure the division of work and family life (Adler et al., 2016). As a result, mothers still bear the main burden of childcare and housework. Based on this strand of gender research, we expect especially mothers to feel more strongly affected by the increased need for

adaptation due to the pandemic restrictions when they are mostly responsible for care work at home (e.g., doing the chores or caring for family members), and additionally, when they are employed, and thus required to adapt to changes in the labor market:

> H4: The family climate decreases more strongly for mothers and adolescents of families with (a) a mother shouldering the higher share of unpaid care work at home and (b) mothers in full-time employment.

3. Empirical Setup

3.1. Data and Sample

Our analysis employs longitudinal survey data from the 2019 wave of the German AID:A family panel (Kuger et al., 2020) and the 2020 AID:A Corona Add-On (Kuger et al., 2021), which was administered four to five months after the first Covid-19 lockdown in Germany (in July–August 2020). About 780 households were surveyed on the living conditions of children, youth, young adults, and parents in both waves.

The family climate in the AID:A survey is elicited based on four survey questions that use a six-point scale, from 1 (*applies fully*) to 6 (*does not apply at all*): (a) I like being with my family; (b) there is often friction in our family; (c) in our family we can talk about everything; (d) there is strong cohesion in our family. These items are a shortened version of the relationship dimension of the German family environment scale (Schneewind, 1988). Reliability analysis reveals that the second item impairs scale consistency significantly, that is, its inclusion decreases Cronbach's alpha from 0.737 to 0.645. Thus, we omit this throughout our analysis and aggregate the three remaining items into an 18-point index of family climate, with higher values representing greater levels of emotional integration within the family.

Our analysis sample consists of 461 mothers with minor children and 273 adolescents aged nine to 17 with non-missing responses on all three items concerning family climate and the relevant explanatory variables in both waves. While our main sample consists of individual family members, we perform additional within-family analyses on a subsample of 188 families, for which we have full information on both mothers and adolescents. Note that fathers were not asked about family climate. We roughly follow the World Health Organization's (2022) definition of adolescence defining adolescents as people between 10 and 19 years of age. Throughout the analysis, we employ inclusion weights for initial and continued survey participation (Valliant et al., 2018). We multiply the initial inclusion weight with an individual propensity weight for continued participation in the 2020 Corona Add-On study that corrects the sample regarding panel attrition bias due to poor contact information and contact quality from the first wave (e.g., interruptions of the

interview, household incompletely surveyed, or incorrect address).

Table 1 contains summary statistics of our measure of family climate for adolescents and mothers separately. We additionally report statistics for two subgroups of mothers: 306 mothers with adolescent children aged nine to 17 and 155 mothers with children no older than eight. Adolescents report on average lower levels of family climate than mothers. Mothers of children aged eight and under report the highest levels of family climate among the groups. For all groups of mothers and adolescents, the level of family climate decreases between 2019 and 2020.

Table A1 in the Supplementary File contains summary statistics of socio-demographics and the relevant explanatory variables at the family level. An indicator of whether there is more than one minor child in the household, the age of the youngest child (five categories), the share of male children, municipal population size, and migration background represent basic demographics. To address our hypotheses on resources, they are complemented by socio-economic indicators of parental education (at least one parent holds a university degree), poverty (net household income below 60% of the median income), and levels of social support (according to the Oslo social support scale by Kocalevent et al., 2018). Besides, we include maternal labor market attachment (four categories: not employed, less than 20, 20–32, or more than 32 weekly work hours) and maternal share of unpaid work (maternal share of total daily parental hours spent on childcare, chores, and organizational tasks within the family) to test the hypotheses specific for parents. For adolescents, we further report age and gender, as well as the availability of technical devices for school tasks during the first Covid-19 lockdown, and the frequencies of shared family activities ("how often are you doing the following activities in your spare time: joint activities with parents or siblings") reported in 2019 and 2020 (see summary statistics displayed in Table A2 in the Supplementary File).

3.2. Analytical Strategy

Besides descriptive statistics, we employ panel models with individual fixed effects to examine the change in family climate for mothers and adolescents between the pre-pandemic period of 2019 and a pandemic period about four to five months after the first Covid-19 lockdown in Germany in August–September 2020. Fixed effects models account for all observed and unobserved factors that are time-invariant. We employ standardized outcomes throughout the analysis.

We aim to first document and compare the extent of changes in family climate for mothers and adolescents and second to explore which socio-economic resources are associated with relatively more pronounced changes over time. We implement the latter by interacting the period dummy with a selection of socio-economic indicators (measured in 2019), one at a time. In particular, we investigate parental education, poverty, maternal labor market attachment, division of unpaid care work between the parental couple, and social support. All regressions control for whether an interview was conducted during school vacations.

4. Results

### 4.1. Documenting Changes in Family Climate During the Pandemic

We investigate perceived changes in family climate between 2019 and August–September 2020, comparing adolescents with mothers of adolescent children (Figure 1) and mothers of adolescent children with mothers of only younger children (Figure A1 in the Supplementary File). The left-hand graphic respectively depicts continuous changes along the 18-point scale of our measures of family climate, whereas the right-hand graphic depicts discrete information on whether family climate decreased, remained unchanged, or increased between 2019 and 2020.

About 44% of both adolescents and mothers of adolescents report decreasing family climate (Figure 1). For a similar fraction of 45% of mothers, the family climate remains unchanged, as well as for a somewhat lower share of 37% among adolescents. Finally, the proportion of adolescents reporting an increase in family climate is, at 19%, relatively higher than the share of mothers that do so (11%). Compared to mothers of adolescents, a larger share of mothers of younger children report a

Table 1. Summary statistics.

	2019			2020		
	Mean	SD	N	Mean	SD	N
Family climate (18-point scale)						
Adolescents (9–17)	13.837	1.551	273	13.010	2.242	273
Mothers (0–17)	14.274	1.209	461	13.246	1.993	461
Mothers (9–17)	14.231	1.249	306	13.294	2.033	306
Mothers (0–8 only)	14.351	1.135	155	13.163	1.926	155

Note: Weighted. Source: Authors' work based on Kuger et al. (2020, 2021).
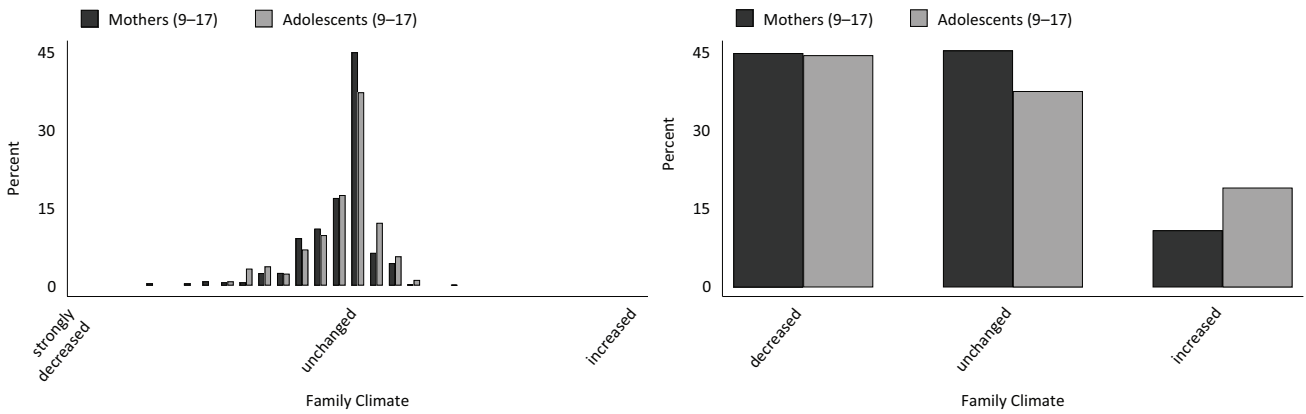
Figure 1. Changes in family climate: Adolescents and mothers. Notes: *N* = 306 mothers of children aged nine to 17 and 273 adolescents; weighted. Source: Authors' work based on Kuger et al. (2020, 2021).

decrease in family climate (54 vs. 44%; Figure A1 in the Supplementary File).

A first set of panel estimations documents the extent of changes in family climate between 2019 and August–September 2020, as reported by adolescents and mothers, now accounting for individual heterogeneity (Table 2). We estimate an overall decrease of about 44% of a standard deviation for mothers of adolescents. Additional analysis reveals that the decrease appears slightly stronger for mothers of younger children than for mothers of adolescents, but the difference is not statistically significant (see Table A3 in the Supplementary File). Adolescents report a similar decrease of about 43% of a standard deviation. Indeed, this estimated decrease is not statistically different from the decrease estimated for mothers of adolescents (see Table 2, Column 2).

To explore within-family differences of decreases in family climate, we focus on a subsample of 188 families, for which we observe both mothers and adolescents. Note that this is necessarily an incomplete picture due to missing paternal information. Note also that we focus on decreases in family climate, since these are

more concerning and more pronounced than increases (see Figure 1). We find that, in almost a third of families (33%), neither mothers nor adolescents report decreases in family climate (Figure 2). In another third of families (34%), the mothers but not the adolescents report decreases. In 20% of families, it is adolescents but not mothers who report decreases in family climate; and in 13% of families, both mothers and adolescents report declines. That is, in just over half of the families in our analysis sample, there is a disaccord between mothers' and adolescents' perspectives on family climate. It is hence plausible that there might be important differences between mothers and adolescents in the factors associated with family climate deterioration during the pandemic.

4.2. Exploring Factors of Family Climate Deterioration During the Pandemic

To explore factors that play a role in changes in family climate during the pandemic, we interact the period dummy with various socio-demographic indicators.

Table 2. Changes in family climate between 2019 and 2020.

Sample	Mothers (9–17) (1)	Mothers (9–17) and youth (9–17) (2)	Adolescents (9–17) (3)
2020	−0.443*** (0.088)	−0.502*** (0.093)	−0.427*** (0.101)
School vacation	−0.075 (0.110)	−0.014 (0.089)	0.004 (0.123)
2020 × youth		0.085 (0.094)	
Constant	0.373*** (0.035)	0.284*** (0.028)	0.160*** (0.040)
Observations	612	1,162	546

Notes: The dependent variable is family climate (standardized); individual fixed effects regressions; robust standard errors in parentheses; standard errors in Columns 5 and 6 are cluster-robust at the household level; weighted; * *p* < 0.10, ** *p* < 0.05, *** *p* < 0.01. Source: Authors' work based on Kuger et al. (2020, 2021).
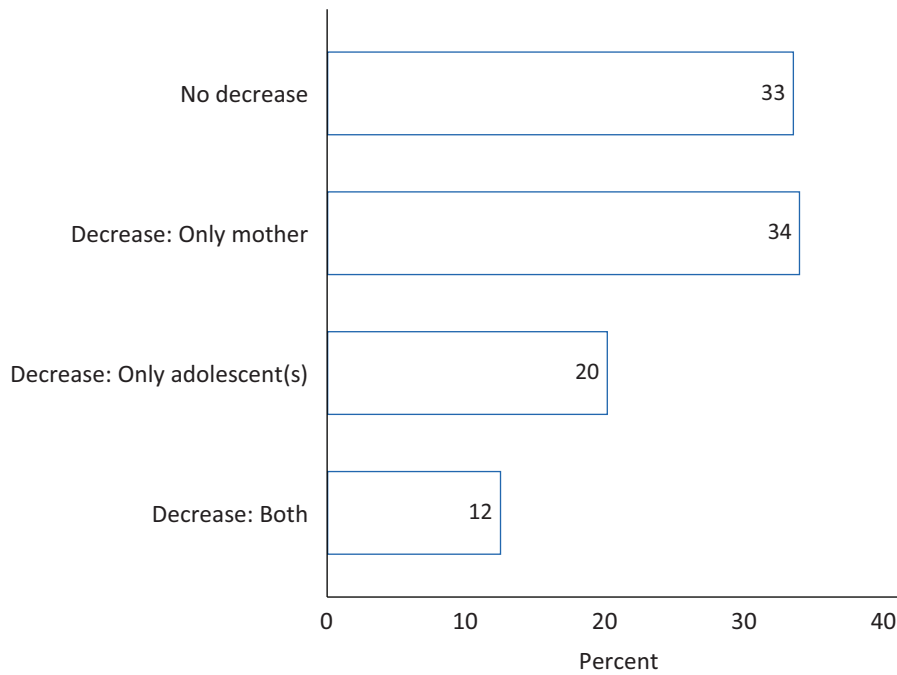
Figure 2. Within-family constellations of decreases in family climate: Adolescents and mothers. Notes: *N* = 188 families with both mother and adolescents observed; weighted. Source: Authors' work based on Kuger et al. (2020, 2021).

Before we investigate the role of economic and social resources and status concerns, we also examine whether basic demographic factors are associated with relatively more pronounced changes over time (see Tables A.5 and A.6 in the Supplementary File). We find, for example, that the share of male children in the household and living in a rural area are relevant factors mitigating the deterioration of family climate for mothers, but only for those with younger children. Own gender does not play a significant role in how adolescents perceive changes in family climate. Migration background appears to augment decreases in family climate for mothers of adolescents. While the age of the youngest child in the household plays no apparent role in family climate, own age appears to matter for adolescents. In fact, nine- and 10-year-olds report on average no significant decreases in family climate between 2019 and 2020, while older age groups increasingly do so. Whether there is only one or more than one minor child in a household appears to have no relevant association with decreases in how mothers perceive family climate. However, having siblings appears to significantly reduce decreases in family climate for adolescents.

We now turn to our main analysis. Table 3 presents interactions of the period dummy with indicators of educational family background, poverty, maternal labor market attachment, division of unpaid care work, and social support. At least one parent holding a university degree does not shelter from a decrease in perceived family climate, neither for mothers nor for adolescents. A net household income below the poverty line is associated with stronger declines in family climate among adolescents, while it is not significantly correlated with changes

among mothers of adolescents. Note that whether every minor child has their own room is not associated with either (see Table A7 in the Supplementary File). On the other hand, for mothers of adolescents and for adolescents, maternal labor market attachment (weekly working hours) does not appear to play a significant role in their perception of changes in family climate. For mothers with adolescent children, the only significant factor among those investigated here is the share of unpaid care work. If the reported time spent by mothers on unpaid care work (i.e., childcare and housework) amounts to more than 80% of the total time spent on unpaid care work in the parental couple, these mothers report relatively stronger decreases in family climate. The division of care work in the parental couple is, however, not a relevant factor for how mothers of younger children perceive changes in family climate (see Table A4 in the Supplementary File). Finally, levels of social support, according to the Oslo social support scale, do not seem to be a relevant factor for either group.

We expand the analysis for adolescents and investigate whether the availability of technical devices for school tasks during the lockdown and/or changing frequencies of family activities are related to their perception of family climate. On average, the frequency of family activities increased between 2019 and 2020 (see Table A2 in the Supplementary File). Since family activities have been surveyed among respondents aged 12 and older in 2020, the analysis is restricted to the 12–17 age group. We find that in families that adjusted the frequency of their joint family activities to "daily" or at least "several times a week" during lockdown, adolescents were significantly less likely to report a deterioration of family climate

(see Table 4). This shows us that increasing the frequency of joint family activities in relative terms was not sufficient. In order to provide sufficient protection against a deterioration of the family climate, the frequency of joint family activities had to increase to at least several times a week or even daily. Because this was only possible in a limited number of families, the family climate deteriorated on average for all respondents.

Table 3. Changes in family climate by education, poverty, maternal labor market attachment, division of unpaid care work, and social support.

Sample	Mothers (9–17) (1)	Adolescents (9–17) (2)
2020	−0.524*** (0.114)	−0.326*** (0.118)
2020 × parent university degree	0.195 (0.125)	−0.209 (0.147)
Observations	612	546
2020	−0.448*** (0.095)	−0.324*** (0.087)
2020 × <60% median income	0.038 (0.184)	−0.637*** (0.240)
Observations	612	546
2020	−0.502** (0.199)	−0.491** (0.201)
2020 × mother ≤20 hours/week	−0.022 (0.256)	0.225 (0.234)
2020 × mother 21–32 hours/week	0.061 (0.208)	0.008 (0.226)
2020 × mother ≥33 hours/week	0.141 (0.206)	0.003 (0.239)
Observations	612	546
2020	−0.338*** (0.086)	−0.408*** (0.107)
2020 × ≥80% maternal share unpaid work	−0.556*** (0.204)	−0.094 (0.159)
2020 × single mother	−0.276 (0.280)	−0.368 (0.367)
2020 × father info missing	0.112 (0.117)	0.242 (0.190)
Observations	612	546
2020	−0.572*** (0.198)	−0.243 (0.197)
2020 × Oslo: Medium	0.066 (0.222)	−0.233 (0.227)
2020 × Oslo: Strong	0.233 (0.206)	−0.170 (0.216)
Observations	612	546

Notes: The dependent variabl is family climate (standardized); all models include an indicator for the interview held during school vacations and a constant; individual fixed effects regressions; robust standard errors in parentheses; standard errors in Column 4 are cluster-robust at the household level; weighted; * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$. Source: Authors' work based on Kuger et al. (2020, 2021).

Table 4. Changes in adolescents' perception of family climate by equipment and activities with family.

Sample	Adolescents (9–17) (1)	Adolescents (12–17) (2)
2020	−0.333** (0.163)	−0.511*** (0.121)
2020 × equipment: Always	−0.123 (0.162)	
Activities with family:		
Daily		0.446** (0.181)
Several times a week		0.436** (0.185)
1–2 times per week (ref.)		
1–2 times per month		0.292 (0.197)
Less frequent		−0.253 (0.287)
Never		−1.511 (1.177)
Constant	0.161*** (0.040)	−0.138 (0.101)
Observations	546	358

Notes: The dependent variable is family climate (standardized); all models include an indicator for the interview held during school vacations and a constant; individual fixed effects regressions; standard errors cluster-robust at the household level; weighted; * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$. Source: Authors' work based on Kuger et al. (2020, 2021).

5. Conclusion

How did the family climate change compare to pre-pandemic states? Our findings suggest, similar to what has been found for personal life satisfaction (e.g., Huebener et al., 2021; Zoch et al., 2021), that perceived family climate decreased significantly over the pandemic for roughly half of our surveyed mothers and adolescents. This supports the findings of, for instance, Perelli-Harris and Walzenbach (2020) and Reim et al. (2022) and is particularly concerning given that family climate can be a resilience factor supporting families in coping with challenging living conditions like child abuse, bullying, and internet addiction (e.g., Glaser et al., 1993; Perren et al., 2009; Yen et al., 2007). However, a significant proportion of mothers and adolescents also report an increase in the family climate supporting the findings of, for instance, Perelli-Harris and Walzenbach (2020) and Reim et al. (2022). These could be families who were not particularly challenged by adjustments or whose family practices were even confirmed by the pandemic situation. Further research could make an effort to reveal these mechanisms in detail.

While mothers and adolescents perceive comparable decreases in family climate, their predicting factors differ. Mothers that were primarily responsible for child-care and housework before the pandemic perceive a stronger decline in the family climate. This might reflect a greater adaptive performance based on the existing gender-specific division of labor within the respective household (e.g., Boll et al., 2021; Jessen et al., 2022). From family system theory, we suggest that mothers primarily responsible for doing the chores and care work at home were also responsible for changing and reorganizing family practices during the pandemic. Additionally, they might be involved in conflicts among family members more often resulting in a stronger decrease in their perception of the family climate. On the other hand, the change in the family climate of mothers is similar regardless of the work arrangements and educational background of the parents within households. This result is similar to earlier findings on work arrangements and satisfaction with the family of Zoch et al. (2021) but contradicts the findings on education and life satisfaction of Ohlbrecht and Jellen (2021).

For adolescents, the division of labor between their parents does not seem to make any difference in terms of their perception of the family climate. These results do not support the findings of Langmeyer et al. (2022) who point to the relevance of mothers not working or working at flexible working hours for a better child's well-being. Whereas this was no significant factor for mothers, for

the adolescents in our study, the availability of financial resources is an important factor. On the one hand, we can assume that the closure of schools and leisure facilities represents a material loss (e.g., of planned meals, spare time activities) that has to be compensated for by personal financial expenditure. On the other hand, shifting schoolwork to home introduces new material, spatial, and technical demands in the home, which specifically concern the availability of a suitable workspace and suitable equipment. In low-income households, in particular, adapting to these requirements is more difficult (see also Bujard et al., 2021; Sachser et al., 2021).

Additionally, our results support the assumption that a positive family climate depends on regular interactions within the family. We observed a decrease in the perceived family climate when there was also a decline in family activities; frequent family activities in the pandemic, thus, were able to prevent a decrease in family climate. We also found that family activities occurred slightly more frequently in our sample after the first lockdown than before the pandemic, which we assume to be a concrete strategy of families to maintain family relations.

In contrast, social support from friends, neighbors, and relatives (reported before the start of the pandemic) had no association with changes in perceived family climates. Our results support the assumption of Knabe et al. (2021) that the impact of families' social networks was significantly reduced by contact restrictions during the first lockdown. Contrary to our expectations, we were not able to find an association between the change in the perceived family climate and the availability of technical devices reported retrospectively by the adolescents.

There are some limitations to take into account when interpreting our study. First, we cannot make any statements about fathers' perceptions of the family climate, since they did not receive the respective survey questions. However, with a view to the division of labor within the family, we consider it essential to include the perspective of fathers in future research to improve the interpretation of the results. Second, most of the explanatory variables are not available from the longitudinal perspective, so our interpretation is based on group-specific changes in the family climate over time. This makes causal interpretations significantly more difficult, and thus these should be viewed with caution, which is why we limit ourselves to presenting simple associations. Finally, the repeated survey resulted in an extensive decrease in the sample size, which can potentially be accompanied by distortions in the sample structure. With inclusion weights, we tried to compensate for varying inclusion probabilities due to the contact quality in the initial survey. Nevertheless, we assume stronger panel attrition for people with a migration background and limited knowledge of German, as well as families with higher burdens due to the pandemic. Thus, our findings may underestimate the statistical effects on the total population.

While our study describes the comprehensive changes in family climate between 2019 and 2020, future research should disentangle the effects of school/daycare closures and the overall effects of the pandemic, for example by using regional variation in the intensity of school closures. We will be able to deal with these questions in the following waves of the AID:A survey. A second question to be tackled by future research would concern how perceptions of family climate develop in the further course of the pandemic, which families manage to return to their baseline levels, and which show permanent deterioration.

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Conflict of Interests

The authors declare no conflict of interests.

Supplementary Material

Supplementary material for this article is available online in the format provided by the author (unedited).

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Reshaping Social Capital During the Pandemic Crisis: Age Group Differences in Face-to-Face Contact Network Structures

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Abstract

This article presents findings about the impact of the first Covid-related lockdown on the face-to-face (FTF) interpersonal contact networks of the Hungarian adult population. Our primary objective is to understand how the size, composition, and quality of such networks have changed. We base our analysis on the contact-diary method. Our data were collected from two representative surveys of the Hungarian adult population: one in 2015 (N = 372) and one in May 2020 (N = 1001) during the first wave of the Covid-19 epidemic. No decline in the overall bonding social capital can be detected; however, social isolation has increased. A restructuring has occurred: a considerable increase manifests in the proportion of kin ties, especially children, and a decrease in the importance of non-kin ties, with a particularly sharp decline in friendships. FTF contacts indicate an increased emotional intensity (except for non-kin, non-household members) and an increase in the length of conversations, but there is a decrease in the frequency of meeting alters. The changes wrought different effects on different age groups, with the restrictions most negatively affecting the size of FTF contact networks for respondents aged 60 years or older. Our findings point to the stability and resilience of close family relations, yet the doubling of social isolation as early as May 2020 underlines fears about the pandemic's potentially detrimental effects on social connectedness. The decline in friendship ties (and most probably in other weak ties) may lead to a reduction not only in the amount and scope of accessible social capital but also to a weakening social integration.

1. Introduction

In this unprecedented situation caused by Covid-19, it remains questionable how the population can maintain physical contact. It is a scientifically proven fact that social relationships are a capital—a necessary prerequisite—for a healthy and happy life (e.g., Bian et al., 2020; Cacioppo & Cacioppo, 2014; Helliwell et al., 2015; Uchino, 2004), and that loneliness produces detrimental effects on well-being (Bzdok & Dunbar, 2020).

In general, the more extensive and diverse one's interpersonal network is, the better. The situation of mass crisis epitomized by the Covid-19 pandemic, the daily instrumental and emotional coping needs associated with it—either because of actual lockdown measures or because one was/is quarantined or sick—and the mental toll it lays on people, significantly increase one's needs for such supportive resources. On the other hand, as the coronavirus spreads via personal contact, social distancing thus becomes the primary means of coping with the

threat. Both short- and long-term effects of the pandemic are likely to leave their mark on the structure of interpersonal relationships.

Based on two nationally representative surveys carried out in 2015 and 2020, this article provides insights into how the first wave of restrictive measures affected face-to-face (FTF) contact among the Hungarian adult population. We analyze the overall changes in personal social networks (more precisely egocentric contact networks) as well as specific differences in various age groups. Moreover, we aim to measure the effects on the intensity and quality of FTF contacts during the lockdown.

Various approaches exist to define social capital: They might highlight the importance of family, friends, and community relationships, membership in civic organizations, as well as values and norms such as solidarity and trust (van Oorschot et al., 2006). Social capital is embodied in relations between individuals (Albert & Hajdu, 2016). The existence of social ties and the size composition of personal networks affect the individual's daily life; moreover, these define the available resources. Social networks operate at the meso level between the individual and society, and this operation determines how the individual gains access to various goods, resources, and other groups or institutions using their personal network. Bourdieu (1986) and Coleman (1988) call these types of resources social capital. According to Lin (2008), social capital refers to resources that can be accessed and mobilized through relationships. He conceptualized social capital from a network perspective at the level of the individual (Lukács & Dávid, 2019). Based on the intensity and reciprocity of social ties, Lin distinguishes three forms of social bonding: (a) binding, (b) bonding, and (c) bridging. The article concentrates primarily on bonding and cohesive ties: These relationships form a relatively closed and socio-demographically homogenous group, as members share resources and information. Weak ties can also emerge among bonding ties (Lin, 2008). Examining daily contact during the pandemic, we may learn how social distancing measures—more precisely those limiting physical contact—impact the structure of FTF relations and what kind of ties can survive in such unusual situations. Moreover, it offers the possibility to detect changes in social solidarity.

We built the theoretical framework of our study on Bian's (2020, p. 2) concept of epidemic-specific social capital, which "refers to the social resources that are generated from the networks of ongoing social relations under conditions of physical isolation in a situation such as the Covid-19 pandemic." Bian (2020) defined epidemic-specific social capital as the intensity and extensity of a person's social connectedness under special conditions. It is worth highlighting that, from this aspect, social capital strengthens a person's intimate circles and, at the same time, it promotes maintaining connections with distant alters (i.e., one's contact person) via online platforms. The conceptual structure of epidemic-specific social capital has two internal conditions (intimate circle, distant alters) and one external one (physical isolation). From the two "internal constructs" of epidemic-specific social capital Bian identified, we focus predominantly on bonding social capital, namely, the FTF contacts that compose an individual's intimate circles—mostly close family relations as well as other kin and pseudo-kin ties. In the case of the second construct (distant alters) that is bridging social capital, we also only focus on FTF contacts.

2. The Impact of the Covid-19 Pandemic on Interpersonal Relationships

Several scientists (see, e.g., Clair et al., 2021) have already warned the public of the potential dangers social distancing engenders and recommended a more precise and desirable formulation, i.e., physical distancing and social solidarity. Several studies review the existing literature and propose conceptual frameworks for analyzing the pandemic's possible effects (on the well-being of families and children see, e.g., Prime et al., 2020; on the life course implications of one's being infected with Covid-19 see Settersten et al., 2020). There is a growing body of empirical evidence concerning the actual impact of the first wave of the Covid-19 pandemic on relationships. In line with the quarantine measures, several countries have reported a drastic reduction in interpersonal contacts. For example, in the UK, Jarvis et al. (2020) found a 74% reduction in the average observed daily number of contacts in late March 2020. Zhang et al. (2020), who analyzed contact survey data from Wuhan and Shanghai before and during the epidemic's outbreak, also indicated that daily contacts were reduced seven to eightfold during the Covid-19 social distancing period, with most interactions confined to the household. Age also seemed to have a crucial impact on personal network structures during the pandemic period. In France, a significant difference manifested itself between younger and older age groups: The average number of contacts was 1.7 for respondents aged 65 and over, compared to 3.6 for younger respondents (Bosetti et al., 2021). In Luxembourg, Latsuzbaia et al. (2020) also reported that contacts were reduced by more than 80% during the first wave lockdown: The average number of contacts decreased with age, from 4.2 for participants under 25 years of age to 1.7 for participants over 64 years old.

The first lockdown's negative effects are not only a concern for the older population, but also for younger and middle-aged people. Bu et al. (2020) examined the loneliness levels of almost 40 thousand adults from the UK and identified young people and women to be especially at risk of loneliness, their main protective factors being (a) living with others, (b) the number of friends that they had, (c) and access to social support. On a Dutch panel survey data, Völker (2023) compared the core discussion networks and the networks of practical helpers of young (18–35 years) and old (65+ years)

respondents in May 2019 and 2020: They concluded that the size of both network segments decreased and that especially the younger sample experienced network decay in the core discussion network. For the core discussion networks, reliance on partners increased significantly in the case of the aged and children. In both age groups, people leaned on those they were already close with, while weaker ties faded away. A panel study in the USA comparing data from June 2019 to June 2020 found that the number of close alters did not change significantly. However, network composition did: The number of close friends and workmates decreased while that of family members increased (Kovacs et al., 2021). Between March and June 2020, Lambert et al. (2021) gathered data on the French adult population via a quota sample supplemented with interviews and found growing gender inequalities resulting from the pandemic: Although two-earner families are the most widespread in France, mothers (among others) tended to decrease their engagement in free-time activities so that, even controlling for a number of socio-demographic characteristics, the presence of children in the household affected their lifestyles to a greater extent. A comparative study in several European countries concluded that lockdowns affected those born between 1994 and 2001 more than older age groups (Kaspersky, 2020). Other surveys also found that social distancing, school closures, and lockdowns affected young people more than other age groups (Eurofound, 2020). Hence, in terms of both coping and resilience, as they seek to return to normal, young people struggled more than older age groups. Young respondents (and the unemployed) were the most likely to feel excluded from society.

The pandemic is expected to impact not only the size of one's network but also its quality. Schmid et al. (2021) analyzed the change in employment status (home office and short-time work) that happened during the crisis and its impact on levels of satisfaction in cohabiting couples' relationships. The researchers found that a significant proportion of respondents experienced positive (20%) or negative (40%) changes in their relationships. These results support previous claims that the Covid-19 pandemic, in general, poses a threat to the quality of relationships and family health (e.g., Balzarini et al., 2022; Biroli et al., 2020). Balzarini et al. (2022) showed in a cross-sectional convenience sample that financial strain, social isolation, and perceived stress related to Covid-19 stand negatively associated with the quality of relationships. Up till now, however, no studies have been published representing the impact of the first wave on personal network structures in Central Eastern Europe.

3. Hypotheses

Compared to 2015, in 2020, and based on the epidemic-specific social capital framework, we expect that lockdown interventions affected FTF contact networks in the following ways:

H1: The average number of FTF contacts decreased, and the proportion of physically isolated respondents (without any FTF contacts) increased. Thus, we expect an overall decline in the level of bonding social capital and a higher rate of social isolation.

H2: Within bonding social capital, kin and non-kin relations are affected differently. With close family relations being more accessible, we assume that an increase exists in the average number of such contacts, while in the average number of non-kin contacts, we foresee a significant decrease. We thus expect a divergence in the impact of bonding social capital.

H3: During lockdowns, the intensity of FTF contacts changed. Emotional intensity will increase because people will appreciate their contacts more (i.e., how much the respondent liked the contact). The two indicators of physical intensity (length and frequency) will change differently. Being at home gives people the opportunity to spend more quality time together, so the average length of the FTF interactions can be expected to increase. On the other hand, as people are not allowed to leave home, the frequency of FTF interactions (i.e., how often respondents meet with the same person) will decrease.

H4: Lockdown interventions have affected people's lives differently. Young people were discouraged from socializing and going out with friends and acquaintances. Middle-aged people were overburdened with multiple tasks both at work and at home. Older people were prevented from visiting public places, meeting friends, and physically accessing public services. Therefore, we expect the impact of Covid-19-related restrictions to vary across age groups. We expect a decrease in the number of daily FTF contacts of younger and older age groups and an increase in the number of contacts regarding middle-aged people.

4. Method and Data

4.1. Contact Diary

In this article, social capital is defined from an ego-centric approach, as an individual's relationship with others (Shin, 2021). Ego-centred social network research especially focuses on different types of relationships (Van Der Gaag & Webber, 2008). Besides the various generator methods (name-, position-, or resource-generators), the diary approach remains a very fruitful tool to measure egocentric networks: "If network researchers want to understand an active personal network within a specific period of time, the diary approach that records all contacts with all kinds of persons yields all necessary and complete contact records" (Fu, 2007, p. 208). The contact diary method asks respondents to track

and record all their interpersonal contacts (interactions) over a given period. It measures daily contacts directly and comprehensively, reconstructing the components of the personal networks that are active and adequate in everyday life (Albert et al., 2020; Dávid et al., 2016; Fu, 2005, 2007; Huszti et al., 2013; Lukács & Dávid, 2019). Revealing the daily contacts of egos, a contact diary provides information on the size and composition of personal social networks. Furthermore, it provides diverse information about the individuals' contact with others. According to Bian's (2020, p. 2) theory, epidemic-social capital includes measuring "the intensity and the extensity of a person's social connectedness." The size and composition of personal networks and the frequency of interactions stand as crucial indicators of social capital during the pandemic situation. Social interactions and contact with others have been essential issues in sociological research (Durkheim, 1964; Fu & Hsuan-Wei, 2020). In everyday life, it is normal that people have interpersonal contact with each other (Fu & Hsuan-Wei, 2020). Focusing on FTF contacts, this article examines the changes in interpersonal ties during the pandemic situation, as these embody the links between individuals and society. Differing from the relationships-based approach, Fu and Hsuan-Wei (2020) proposed the contact-based approach. The latter uses "actual contacts among individuals and it measures the social interactions….[It] thus helps us to reconstruct social life more extensively and precisely" (Fu & Hsuan-Wei, 2020, p. 435).

Our data were collected from two different nationwide representative surveys of the Hungarian adult population. The Institute of Sociology of the Hungarian Academy of Sciences and the TÁRKI Social Research Institute conducted the first survey (N = 372) in 2015 (Kovách et al., 2017). The Szinapszis Market Research and Consulting Ltd. (Koltai et al., 2022) conducted the second survey (N = 1001) in May 2020. A multi-step, proportionally stratified, probabilistic sampling procedure was elaborated and implemented in both surveys. Both samples are representative of the Hungarian population aged 18 or older by gender, age, education, and domicile. Data collection was implemented by CAPI survey methodology in 2015 and by CATI survey methodology in 2020.

In 2020, the contact diary survey was a repetition of the 2015 study (for the diary log used at both times see Supplementary File 1), with only one difference: In 2015, respondents listed all interactions for two consecutive days as opposed to 2020, when respondents had to focus only on the day before data collection.

The diary log consisted of three major parts: (a) the type and the place of interaction; (b) the individual and socio-demographic characteristics of the contacted person; and (c) the characteristics of the interaction. The diary logs were divided into three time periods (morning, afternoon, and evening) in 2015, and four time periods in 2020 (midnight to 8 a.m., 8 a.m. to noon, noon to 6 p.m., 6 p.m. to midnight) to make it easier to record multiple interactions with the same contacted person. In both years, the recorded interactions were thoroughly defined to include practically all meaningful interactions, except those that were too short and did not go beyond a greeting. In the contact diary, participants recorded all kinds of contacts occurring FTF, whether over the phone (voice or text messages) or online (email, chat). Regarding building on the theoretical framework, however, in this article, we only deal with FTF contacts and ignore other forms of social interactions such as virtual or computer-mediated communication.

5. Analytical Strategy

Data collection, based on the contact diary, proceeds on different levels: Some questions refer to the level of interactions between the respondent and their contact person (such as the alter; e.g., the length of the conversation or the location of the meeting), while others involve the contacted alters (e.g., frequency of meetings, type of relationship, emotional intensity; see Supplementary File 1). Since we were interested in changes regarding the network characteristics of the respondent (ego), we aggregated all data at the ego level by count (e.g., number of contacted alters in public), mean (e.g., the average length of longest conversations with alters), and by creating dichotomous variables, namely: whether the ego met the given alters in public (*yes/no*) or whether the ego met any kin alters (*yes/no*). For the mean, the data were aggregated in two steps: First, the value of the longest conversation was selected for each alter and then the mean value of the longest conversations with alters was computed for each ego. Furthermore, combined variables were also calculated to investigate specific groups of alters to ego (e.g., mean length of longest conversations with kin alters). Table 1 summarizes the different levels and the process of aggregation.

Table 1. Different levels of analysis in the contact diary and the steps of aggregation.

Levels of analysis	Described characteristics	Examples
Level 3	characteristics of ego	ego met a given alter in public (*yes/no*); number of alters met in public; mean length of longest conversations with alter, mean frequency of meetings with alters
Level 2	characteristics of alter	ego met alter in public (*yes/no*); longest conversation with alter, frequency of meetings
Level 1	characteristics of interactions	place of meeting; length of conversation

In the results section, we first describe dichotomous variables and compare data from 2015 and 2020 based on descriptive statistics. The size of the personal network, i.e., the number of alters, reflects the number of individuals listed in the contact diary as FTF, physical contacts. The composition of the network was measured by (a) the number of kin relations, (b) the number of non-kin relations, and (c) the proportion of different types of relationships. Regarding FTF physical interactions, we also analyzed the location of the interaction. The physical intensity contact measures included the frequency and the length of FTF contact, while the emotional intensity measures referred to how much the ego liked the alter (see the diary log in Supplementary File 1).

We applied a non-parametric Mann-Whitney U test to our data. To avoid the problem of multiple comparisons, our results were adjusted by Bonferroni correction, which can also be applied to non-parametric procedures such as the Mann-Whitney test (Shaffer, 1995). The results of the Mann-Whitney tests were tested against a Bonferroni-corrected level of significance.

6. Basic Characteristics of the Data

Both datasets were weighted for gender and age groups based on the 2016 Hungarian microcensus. The ratio of males stood at 46.9%. The age group distribution was as follows: 17.6% for 18 to 29-year-olds, 17% for 30 to 39-year-olds, and 18.8% for 40 to 49-year-olds. The smallest age group consisted of those aged 50 to 59 (15%), while the largest comprised the ones aged 60 and over (31.5%). We applied no other weighting dimensions due to the small sample size in 2015.

The ratio of respondents having lower education stood higher in 2020 (22% vs 17%), while in 2015, the ratio of respondents with secondary education stood higher (see Table 2). Chi-square test statistics, however, show no significant differences between the two examined years at the .05 significance level (X^2 (2, N = 1373) = 5.655, p = .059).

In terms of household size, the proportion of respondents living alone remained the same, around 20%. Interestingly, there seems to have been a shift from

Table 2. Socio-demographic characteristics of respondents.

	2015		2020	
	N	%	N	%
Education				
Elementary or lower	62	16.6	216	21.6
Secondary	232	62.4	558	55.7
Higher education	78	21.0	227	22.7
Household size (without ego)				
0	79	21.2	202	20.1
1	138	37.1	299	29.9
2	87	23.3	207	20.7
3	33	8.9	171	17.1
4	22	6.0	84	8.4
5	9	2.5	23	2.3
6+	4	1	16	1.5
Type of settlement				
Capital city	81	21.8	189	18.9
County towns	62	16.6	178	17.8
Other towns	124	33.2	369	36.9
Villages	105	28.4	265	26.4
Employment status				
Employed in 2015; worked at least 1 hour in the last week in 2020	212	57.3	535	53.4
Unemployed	13	3.5	53	5.4
Temporarily not working due to coronavirus	—	—	27	2.6
Retired	110	29.6	256	25.6
On parental leave	12	3.3	40	4.0
Student	19	5.2	23	2.3
Other inactive	4	1.1	68	6.7
Total	372	100	1001	100

smaller households of two or three persons to households of four people in 2020; this proportion almost doubled in 2020 (from 9% to 17%). The differences are statistically significant (X^2 (6, N = 1374) = 20.529, p = .002, C = .122). It seems likely that children studying elsewhere and no longer living with their families moved home temporarily during the lockdown. The average household size (ego included) increased significantly between 2015 and 2020, from 2.53 to 2.73 ((Mdn_{2015} = 1; Mdn_{2020} = 2) U(N_{2015} = 412, N_{2020} = 1001) = 187748.5, z = −2,7256, p = .006, rg = .08). The differences in employment status clearly reflect how the lives of workers have changed during the restrictions. We see a minor increase in the rate of the unemployed (including those who were temporarily out of work due to the coronavirus) and in the group of the other inactive (from 1.1%, it increased to 6.7%). Differences in employment status cannot be compared statistically, as the questions were asked in slightly different ways concerning the two years. No statistically significant difference exists between the two years regarding the type of settlement (X^2 (3, N = 1373) = 2.598, p = .458), as per Table 2.

7. Results

7.1. Face-To-Face Personal Network Characteristics

Although the range in the number of alters (Min_{2015} = 0, Min_{2020} = 0; Max_{2015} = 14; Max_{2020} = 21) mentioned and the standard deviation (SD_{2015} = 2.26; SD_{2020} = 2.84) values differ, the mean (M_{2015} = 2.9, M_{2020} = 2.9) and median (Mdn_{2015} = 2; Mdn_{2020} = 2) number of FTF contacts (number of contacted persons per day) did not change. The average size of the FTF network stood at 2.9 both in 2015 and 2020. The difference is also not significant based on the Mann-Whitney U test (U(N_{2015} = 412, N_{2020} = 1001) = 193862.5, z = −1,790, p = .073). Based on these results, we reject the first part of H1 where we hypothesized that the average number of FTF contacts would decrease during the pandemic. When we analyze the ego's FTF network composition in more detail, the picture becomes much more diverse (see Table 3).

In 2020, the ratio of socially isolated respondents, i.e., those who did not mention any FTF contacts on the day of the survey, doubled from 10 to 20%. Based on Chi-square statistics, these differences are significant (X^2 (3, N = 1366) = 50.576, p = .000, C = .192). During the

lockdown, people became socially more isolated than before, confirming the 2nd part of H1, where we hypothesized that the proportion of physically isolated respondents (without any FTF contacts) would increase.

If we focus on the different bonding types—that is, close familial and non-familial ties—we find a reconstruction of some kind. A considerable increase appears in the proportion of respondents who mentioned kin ties only (from 25% to 37%) and a decrease in the proportion of those who met solely non-kin alters (from 18% to 13%). In 2020, a larger proportion of respondents had FTF contact with their children (an increase from 28% to 35% respectively), while the proportion of those who mentioned FTF friendship ties dropped from 26% to 8%. These findings are in line with our expectation that the impact on bonding social capital varies depending on the type of the relationship: Kin ties became more prevailing while non-kin ties became less important. H2 is, therefore, verified.

Results show that the three measures of relationship intensity (emotional intensity, or how much ego likes alter; physical intensity 1, i.e., the mean length of conversations with the alter; and physical intensity 2, i.e., the mean frequency of meetings with the alter) varied between 2015 and 2020. The Bonferroni Mann-Whitney U tests show that for each intensity measure, the values reveal significant changes. In 2020, respondents were emotionally more appreciative of those with whom they had FTF contact (Mdn = 5) than in 2015 ((Mdn = 4.5) U(N_{2015} = 388, N_{2020} = 860) = 144770, z = −3.96, p = .000, rg = .13). And unsurprisingly, they spent more time together ((Mdn_{2020} = 3.67; Mdn_{2015} = 3.17) U(N_{2015} = 389, N_{2020} = 860) = 121043, z = −7.86, p = .000, rg = .28) but met less often ((Mdn_{2020} = 6.57; Mdn_{2015} = 6.8) U(N_{2015} = 390, N_{2020} = 860) = 144915, z = −3,880, p = .000, rg = .14). Based on these findings, H3 is verified, as emotional intensity increased during the pandemic while the two indicators of physical intensity changed differently. The mean length of conversation increased, while the frequency of meetings decreased.

A systematic age-specific component emerges in the FTF contact network structures during Covid-19. Table 4 and Table 5 clearly show that the significant changes measured above had various effects on the various age groups, so H4 is also verified. The test statistics suggest that the restrictions mostly affected the FTF networks of respondents aged 60 or older; their contact

Table 3. Ego's face-to-face contact network composition.

	2015 (N = 366)		2020 (N = 1000)	
	N	%	N	%
Isolated (no FTF contact)	38	10	197	20
Kin ties (spouse/partner, parent, child, sibling, other relatives)	90	25	367	37
Non-kin ties (friend, neighbor, colleague, acquaintanceship, other)	66	18	130	13
Both kin and non-kin ties	172	47	306	30

Table 4. Mean number of contacted alters, kin alters, and non-kin alters (per day) by respondents' age group (with Bonferroni Mann-Whitney U tests; only significant values).

Age group	18–29		30–39		40–49		50–59		60+		Total	
	2015	2020	2015	2020	2015	2020	2015	2020	2015	2020	2015	2020
	n = 84	n = 179	n = 72	n = 168	n = 63	n = 188	n = 62	n = 148	n = 131	n = 318	N = 412	N = 1001
total number of alters contacted (mean)									2.55	1.88		
									(U = 15887.5; p = .000)			
number of non-kin alters contacted (mean)							2	1.25	1.44	0.68	1.45	1.18
							(U = 3405; p = .002)		(U = 13796.5; p = .000)		(U = 166050; p = .000)	

Notes: Bonferroni corrected level of significance: p < 0.01; N are weighted values.

Table 5. Mean number of contacted alters by respondents' age group and by respondents' relationship to alters (per day) (with Bonferroni Mann-Whitney U tests; only significant values).

Age group		18–29		30–39		40–49		50–59		60+		Total	
		2015	2020	2015	2020	2015	2020	2015	2020	2015	2020	2015	2020
		n = 84	n = 179	n = 72	n = 168	n = 63	n = 188	n = 62	n = 148	n = 131	n = 318	N = 412	N = 1001
Kin	children					0.55	0.94					0.41	0.58
						(U = 4442; p = .001)						(U = 190328.5; p = .006)	
Non-kin	colleagues												
	friends	0.57	0.25	0.32	0.11			0.48	0.16	0.38	0.09	0.39	0.14
		(U = 5442; p = .000)		(U = 5137; p = .001)				(U = 3796; p = .001)		(U = 17295; p = .000)		(U = 168541; p = .000)	
Household members						1.01	1.68	0.72	1.34			0.89	1.23
						(U = 4281; p = .001)		(U = 3305.5; p = .001)				(U = 185416; p = .002)	
Non-household	all alters							3.34	1.87	2.36	1.22	2.40	1.69
								(U = 3183.5; p = .000)		(U = 13485; p = .000)		(U = 157622; p = .000)	
	kin alters											0.55	0.48
												(U = 189414.5; p = .002)	
	non-kin alters							2	1.20	1.44	0.65	1.45	1.12
								(U = 3332; p = .001)		(U = 13510.5; p = .000)		(U = 161956.5; p = .000)	

Notes: Bonferroni corrected level of significance: p < 0.01; N are weighted values.

networks were "disrupted" in many ways. This age group saw the most dramatic shrinkage in size: With an average of 0.6 persons "lost" around them compared to 2015, this change is statistically significant ((Mdn_{2015} = 2, Mdn_{2020} = 2) U(N_{2015} = 131, N_{2020} = 318) = 15887.5, z = −4.040, p = .000, rg = .24). There is an even greater decline among non-kin contacts (0,75) ((Mdn_{2015} = 1, Mdn_{2020} = 0) U(N_{2015} = 131, N_{2020} = 318) = 13796, z = −6.321, p = 0.000, rg = .34).

With the exception of respondents aged 40 to 49, people from all other age groups contacted significantly fewer friends (Table 5). On the other hand, the number of contacted colleagues and neighbours did not differ between the two years studied. As with the 50–59 age group, the loss was limited to non-kin ties outside one's household. Generally, people had less contact with family members living outside the household ((Mdn_{2015} = 0, Mdn_{2020} = 0) U(N_{2015} = 412, N_{2020} = 1001) = 189414.5, z = −3.039, p = .002, rg = .08). In this case, there was no specific age effect. We have also experienced changes in the opposite direction (increase in FTF contacts) due to Covid-19 pandemic-related restrictions. The two middle-aged groups (40 to 49 and 50 to 59) mentioned significantly more people in their households. For the age group 40–49, this was: ((Mdn_{2015} = 1, Mdn_{2020} = 1) U(N_{2015} = 63, N_{2020} = 188) = 4281, z = −3.405, p = .001, rg = .28); for the age group 50–59, this was: ((Mdn_{2015} = 1, Mdn_{2020} = 1) U(N_{2015} = 62, N_{2020} = 148) = 3305.5, z = −3.338, p = .001, rg = .28). In the case of 40 to 49-year-olds, the number of contacted children per day also increased significantly ((Mdn_{2015} = 0, Mdn_{2020} = 0) U(N_{2015} = 63, N_{2020} = 188) = 4442, z = −3.257, p = .001, rg = .25). An interesting question is whether this increase exhibits the consequence of their children moving back home during the lockdown or whether these parents "suddenly discovered" or "noticed" their children and simply spent more quality time with them: for example, eating together or watching a movie. Based on Table 5, this increase seems somehow unbalanced: no such increase was recorded in the case of young people (18 to 29-year-olds) mentioning their parents.

Having a reduced possibility to meet in person, the number of young people contacting one another in public places fell dramatically ((Mdn_{2015} = 0, Mdn_{2020} = 0) U(N_{2015} = 84, N_{2020} = 179) = 5763, z = −4.114, p = .000, rg = .24). This had similarly affected the oldest respondents. For the 50–59 age group, this was: ((Mdn_{2015} = 0, Mdn_{2020} = 0) U(N_{2015} = 62, N_{2020} = 148) = 3771.5, z = −2.620, p = .009, rg = .18). For people aged 60 and over, who could not socialize outside their homes or visit each other at home, this was: ((Mdn_{2015} = 0, Mdn_{2020} = 0) U(N_{2015} = 131, N_{2020} = 318) = 16757.5, z = −4.554, p = .000, rg = .20); see Table 6.

Perhaps surprisingly, people in 2020 mentioned slightly but significantly more workplace contacts ((Mdn_{2015} = 0, Mdn_{2020} = 0) U(N_{2015} = 412, N_{2020} = 1001) = 192065.5, z = −2.757, p = .006, rg = .07). In such circumstances, when people suddenly lose all other FTF contacts, they start valuing and recalling contacts that they would not have otherwise mentioned.

8. Discussion

Our analysis aims to extend the existing body of evidence concerning the impact of the Covid-19 pandemic on personal relationships. In Bian's (2020) terminology, we compared a certain segment of epidemic-specific social capital, namely bonding social capital, by comparing the characteristics of the FTF contact networks of the Hungarian adult population to those they had in 2015. Three of the four hypotheses were confirmed and one was partly verified.

We found that despite the restrictive measures, no overall decline in the bonding social capital occurred during the first wave of the Covid-19 pandemic, as measured by the average number of FTF contacts made on a given day. The composition of FTF networks has been restructured, with a considerable increase in the proportion of kin ties and a decrease in the importance of non-kin ties: A higher proportion of the respondents (from 28% to 35% respectively) contacted their children (X^2 (1, N = 1373) = 5.559, p = .018, C = .064), while a lower proportion contacted their friends (from 26% to 8% respectively) (X^2 (1, N = 1374) = 77.871, p = .000, C = .238).

Unfortunately, the prevalence of social isolation has doubled, and indeed, the pandemic may easily be followed by an epidemic of loneliness (Clair et al., 2021). It is worth noting that in 2020, 59% of the respondents who reported no physical interaction on the day of the survey were not living alone. This proportion stood higher (75%) in 2015 (X^2 (1, N = 233) = 3.795, p = .051, C = .128), which may indicate that during the pandemic, people living together 'discover' one another and have more time and opportunities to interact more frequently. When FTF contact could no longer be taken for granted, all of a sudden, people might have realized how important it was, and sought opportunities for such interactions outside their homes and at their workplaces.

Our results may indicate the stability and resilience of strong tie relations: The registered FTF contacts indicate a somewhat increased level of emotional intensity (liking) and length of conversation, but a decrease in the overall frequency of encounters. The observed changes in intensity measures affected various alters in the ego's contact network differently (for a more detailed picture see Supplementary File 2). Respondents spent significantly more time with their close family members, such as spouses, parents, child(ren) and siblings when they lived in the same household, i.e., when they lived together ((Mdn_{2015} = 4, Mdn_{2020} = 5) U(N_{2015} = 217, N_{2020} = 541) = 38551, z = −7.864, p = .000, rg = .34). People were more connected by being confined to their homes; spontaneously or not, they interacted more with their family members. On the other hand, the number of FTF contacts outside the home decreased:

Table 6. Mean number of contacted alters (per day) by respondents' age and the place of meeting (with Bonferroni Mann-Whitney U tests; only significant values).

Age group	18–29		30–39		40–49		50–59		60+		Total	
	2015	2020	2015	2020	2015	2020	2015	2020	2015	2020	2015	2020
	n = 84	n = 179	n = 72	n = 168	n = 63	n = 188	n = 62	n = 148	n = 131	n = 318	N = 412	N = 1001
Shop, public place	0.64	0.2					0.72	0.40	0.60	0.30	0.58	0.36
	(U = 5763; p = .000)						(U = 3771.5; p = .009)		(U = 16757.5; p = .000)		(U = 172566; p = .000)	
Home									1.7	1.29		
									(U = 16370; p = .000)			
Workplace											0.63	0.69
											(U = 192065.5; p = .006)	

Notes: Bonferroni corrected level of significance: p < 0.01; N are weighted values.

This had a negative impact on the frequency of meeting family members they are not living together with ($Mdn_{2015} = 8$, $Mdn_{2020} = 6$) $U(N_{2015} = 145, N_{2020} = 256) = 10111$, $z = -7.750$, $p = .000$, $rg = .45$) and non-family contacts such as friends (($Mdn_{2015} = 6.5$, $Mdn_{2020} = 5$) $U(N_{2015} = 110, N_{2020} = 82) = 2435.5$, $z = -5.529$, $p = .000$, $rg = .46$) and colleagues (($Mdn_{2015} = 8$, $Mdn_{2020} = 7$) $U(N_{2015} = 76, N_{2020} = 163) = 3805$, $z = -5.007$, $p = .000$, $rg = .24$). Emotional intensity, which generally increased at the respondent level, actually decreased in one specific case, among non-kin, non-household members (($Mdn_{2015} = 4$, $Mdn_{2020} = 4$) $U(N_{2015} = 264, N_{2020} = 416) = 48735.5$, $z = -2.572$, $p = .010$, $rg = .11$). Because respondents could not voluntarily meet with whom they wanted and liked (i.e., close non-kin ties), the ones they did encounter were emotionally rather neutral to them.

In line with recent studies focusing on the pandemic, we found that restrictive measures affected different age groups differently. International surveys almost unanimously indicate that the size of interpersonal networks is significantly influenced by the age of the ego, e.g., young people dominantly have bigger networks and maintain more friendships than older people (Ajrouch et al., 2005; Albert & Dávid, 2018; Dunbar, 2016; Harling et al., 2018; Hill & Dunbar, 2003; Kohli et al., 2009; van Tilburg, 1998). Data from 2015 showed that in Hungary, while network size decreased with age, the strength of ties increased. Retirement, deteriorating health, and the death of a partner were the main factors responsible for the decrease in network size (Albert et al., 2020). According to Dunbar (2018), young people can be characterized by increased "social promiscuity" as they seek suitable lifelong friends and romantic partners in the widest possible circles, and as they age, particularly with the birth of their children, some of the less homophilous/appropriate relationships disintegrate and resources are increasingly concentrated on maintaining the strongest relationships.

In light of this, it may not come as a surprise that the FTF network of respondents aged 60 or over comprised those most affected by the restrictions, with the most dramatic shrinkage in the size of their FTF contact network. The loss of contacts particularly affected the voluntarily chosen friendship ties: Apart from the respondents aged 40–49, people in all other age groups contacted significantly fewer friends. On the other hand, the number of colleagues and neighbours contacted did not differ between the two years studied, which is not surprising: These ties are simply "given" in the setting we live in.

The lockdown restrictions affected older respondents enormously: They could not socialize outside their homes, nor could they visit each other at home. This was especially distressing for those older than 60 and living alone: In 2015, almost 35% of their FTF contact took place in public places or offices. For such people, non-kin ties, usually acquaintances (various service providers including social sector workers) are the main source to satisfy the needs of belonging.

The increased burden on the sandwich generations is also reflected in their network structure: The two middle-aged groups (40–49 and 50–59) mentioned significantly more people in their households. Other studies highlighted that households had to deal with a significantly increased volume of childcare without much institutional assistance (Fodor et al., 2021) and that elderly parents were often supported by their middle-aged children by running various errands for them so that they could stay at home without the risk of catching the virus.

Over the past decades, we have observed that in core discussion networks the composition has changed, and friendships have become increasingly important. In particular, young people remain less likely to engage in family ties than older people and this effect intensified over time in the period studied, which lay between 1997–2015 (Albert et al., 2021). Changes related to the pandemic may alter this path or may leave younger generations particularly deprived and vulnerable, as their confidants are their friends rather than family members with whom they can maintain FTF contact during lockdowns. The drastic loss of friends from FTF contact networks may also be detrimental to social integration and cohesion, as these ties might provide access to more diverse resources than close family ties. The mental health consequences of social isolation at an early age (for both adolescents and young adults) are unknown, but as longitudinal studies suggest (Yang et al., 2016), social embeddedness in young adults is linked to better physical health over the course of life.

According to Bian (2020, p. 427), "the more connected one remains to distant alters, the greater availability of context-specific information one keeps acquiring and the more resources one has in coping with Covid 19." As the number of FTF non-kin contacts decreases, it indicates a deficiency in this regard, which may be somewhat compensated by the remaining, strengthening, and intensifying FTF kin ties. With the contact diary approach—a direct and more extensive method to measure egocentric FTF networks—researchers can collect the actual contact data of the individual and study its dynamics amid such strange and atypical circumstances (Fu, 2005, 2007).

9. Limitations

Our chosen methodology can detect statistically significant differences between two independent samples only at the population level. We do not have panel data; therefore, we are not able to detect changes on the individual level. Moreover, we cannot exclude alternative explanations on the population level; we could only assume that all other factors remained the same between 2015 and 2020, except for the Covid-19 pandemic. Nevertheless, our results seem to support the theory that changes are due to the pandemic. For instance, the average household size probably increased because people moved together during the time of the lockdown (for instance,

young adults might have moved home because dormitories were closed). Furthermore, detected changes in the population's employment status are probably because many people lost their jobs (or were temporarily off from work) and also because of the virus and the lockdown. Another limitation of the study involves the mode of the data collection not being the same in the two years. Data collection was implemented by CAPI survey methodology in 2015 and by CATI survey methodology in 2020.

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Conflict of Interests

The authors declare no conflict of interest.

Supplementary Material

Supplementary material for this article is available online in the format provided by the author (unedited).

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Article

Coping With Covid-19: Older Europeans and the Challenges of Connectedness and Loneliness

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Abstract

Social networks are important for well-being and healthy aging. However, older adults are more likely to have less social contact with others than their younger counterparts due to significant changes in their lives, such as retirement or age-related losses, along with declining health and mobility. Consequently, with increasing age, a growing proportion of people experience feelings of loneliness. This becomes even more important during pandemics when social contact should be minimized. Therefore, this article examines the extent and patterns of loneliness before and during the first two years of the Covid-19 pandemic and how social contact and the type of communication affected levels of loneliness during the pandemic. To investigate loneliness, social contact, and their association during the pandemic, this study uses representative data from 27 countries from SHARE (Survey of Health, Ageing, and Retirement in Europe). The analyses are based on a balanced panel covering three consecutive waves with 28,448 respondents aged 50 years or older. The results indicate that three out of ten Europeans face loneliness in later life. While loneliness has increased for a significant part of the elderly in the wake of the pandemic, there has also been a reverse trend in terms of a decrease in feelings of loneliness for an almost equal proportion of people. Additionally, multivariate analyses highlight that nonpersonal communication cannot substitute face-to-face interaction and can potentially increase feelings of loneliness.

Issue

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1. Introduction

In response to the outbreak of Covid-19, many countries implemented temporary epidemic control measures, such as border and business closures, mask requirements, working from home, face-to-face contact limitations or even interdictions between different households, and the universal precept of social distancing in private and public. In general, these measures should help reduce or even stop the spread of severe acute respiratory syndrome coronavirus type 2 (SARS-CoV-2). Such recommendations were implemented to protect everyone, especially vulnerable parts of the population, from

infection. This has been particularly important for the elderly because they have a higher risk of serious illness and possible death directly or indirectly related to Covid-19 infection (Posch et al., 2020).

Although social distancing could slow or reduce the infection rate (Vokó & Pitter, 2020), its impact on individual well-being is less clear. Social distancing might directly harm personal well-being (Armitage & Nellums, 2020), especially the well-being of older individuals who increasingly live alone and commonly face age-related mental health issues, such as depression, anxiety, cognitive impairment, or dementia (Riedel-Heller et al., 2006). Although social isolation is not necessarily related to

loneliness and vice versa (Hawkley & Cacioppo, 2010), previous research has noted a greater risk of loneliness for societally isolated people (de Jong Gierveld et al., 2006; Santini et al., 2020). Given that social isolation can lead to feelings of loneliness, the ongoing pandemic can amplify this effect and adversely impact mental health and well-being (Banerjee & Rai, 2020).

Although previous research has shown that negative and stressful situations might intensify loneliness in older adults (Hensley et al., 2012), little is currently known about the Covid-19 pandemic's influence on loneliness (Vahia et al., 2020) and social isolation in later life. Recent studies on mental health affected by the Covid-19 pandemic have consistently found that older adults have shown higher levels of loneliness since the outbreak (Killgore et al., 2020; Krendl & Perry, 2021; van Tilburg et al., 2021; Wang et al., 2020) and that the situation varies depending on the general social network size (Macdonald & Hülür, 2021). Although social distancing might negatively affect mental well-being, especially that of older adults during the pandemic, modern forms of communication can help people maintain contact with family and friends despite geographical and social distances. However, previous research has emphasized an age-related digital gap in using information and communication technologies, suggesting that a significant proportion of older adults are unfamiliar with the potential of modern communication (König, Seifert, & Doh, 2018). This raises questions about the role of personal and electronic contact in later life and during the pandemic, as well as how the type, extent, and ratio of the communication might prevent or provoke loneliness, which this article aims to investigate.

The following section addresses the aspect of loneliness in later life, the role of social contact, and changes due to Covid-19, both theoretically and from a review of prior research. The subsequent section presents the data utilized, explains the operationalization of the observed variables, and outlines the methodological approach. The empirical—descriptive and multivariate—results are presented and discussed thereafter. This article concludes with a summary and discussion.

2. Loneliness, Social Contacts, and Covid-19

Loneliness, a complex psychological concept (Dykstra, 2009), can generally be described as a discrepancy between the desired and achieved amount of contact and emotions (Perlman & Peplau, 1981). It is further characterized by a perceived lack of control over one's social activities (Luhmann & Hawkley, 2016). Following Perlman and Peplau (1981, p. 31), loneliness can be defined as "the unpleasant experience that occurs when a person's network of social relations is deficient in some important way, either quantitatively or qualitatively." Weiss (1973) identified two forms of loneliness: social and emotional. While social loneliness derives from the lack of a broader social network or activities and tends to

affect younger people, emotional loneliness stems from a lack of emotional and close relations and increases later in life (Dykstra, 2009).

During pandemics such as Covid-19 we can adhere to social distancing, but long periods of isolation, quarantine, or even the uncertainty of what happens next and how long it will last affect mental well-being because individual control over social contact and activities is limited. Previous work has noted that long periods of isolation or quarantine have detrimental effects on well-being (Stickley & Koyanagi, 2016), and there is a general decline in the size of social networks and the number of daily social interactions with increasing age (Kalmijn, 2012; McDonald & Mair, 2010). Following Carstensen (1991), this might be due to individual adjustment to impending mortality and a refocusing to enrich and maintain existing relationships rather than to invest in forming new ones. Moreover, there is evidence that the age-related decline in social network activity is largely due to social structural factors, including the changing availability of potential alters (Cornwell, 2011; Marcum, 2013). In line with the convoy model of social relations, the shift from quantity to quality regarding individual social networks in later life is mainly explained by the reduction of contacts with acquaintances and friends, but less concerning the closest circle (Kahn & Antonucci, 1980). Hence, the value of such reduced contact becomes more important in later life (Zhaoyang et al., 2018), and social isolation can increase feelings of loneliness, especially during a pandemic.

The outbreak and spread of Covid-19 have affected all individuals, particularly the older population, in various ways. As the latter belong to a higher-risk group associated with more serious diseases in terms of Covid-19 infection, they were especially urged by many politicians and scientists to reduce their in-person contact with family, friends, and others, which might have led to a situation of being and feeling more socially isolated. Furthermore, being reminded of their belonging to a group of higher risk may induce negative self-perceptions, leading to isolation and loneliness (Hwang et al., 2020). Several studies have found an increase in loneliness in the first year of the Covid-19 pandemic (e.g., Gauthier et al., 2021; Killgore et al., 2020; Krendl & Perry, 2021; van Tilburg et al., 2021; Vlachantoni et al., 2022).

Even before the pandemic, some studies indicated that frequent and intense face-to-face interactions were associated with less loneliness (Lee & Ko, 2018; Robinson et al., 2016; Russell et al., 1980). Simultaneously, the ability to use and the effect of electronic communication on loneliness and its extent have been less explored and are thus less clear. In general, using modern communication channels, such as (smart)phones, emails, and video calls, may have the potential to overcome loneliness later in life (Fokkema & Knipscheer, 2007) and during periods of physical distancing. However, regarding the influence of social contact to avoid social isolation and

feelings of loneliness, recent findings have emphasized that in-person contact has benefits, such as direct inter-action, handshakes, embracement, and physical closeness, which are not available from electronic contact (Fingerman et al., 2021).

Cohn-Schwartz et al. (2022) analyzed the direct and indirect associations between physical distancing, social interaction, and loneliness in various countries. Their empirical findings indicated that periods of physical distancing were directly associated with higher levels of loneliness in later life. Furthermore, it seems that face-to-face contact reduces the risk of a strong increase in loneliness during the pandemic, while non-personal communication is an ineffective substitute for face-to-face interaction (Kovacs et al., 2021; see also Atzendorf & Gruber, 2021). Being in contact electronically cannot offset older adults' loneliness but rather could potentially reinforce it (Krendl & Perry, 2021).

In addition to the influence of social networks and social contact, previous research indicated that women, the elderly living alone, individuals with restricted financial resources, and those with health limitations were particularly affected by increased loneliness during Covid-19 (see, e.g., Atzendorf & Gruber, 2021; Khan & Kadoya, 2021; Seifert & Hassler, 2020). Further findings suggested that employment situations and living areas seemed to affect patterns of loneliness during the pandemic (Khan & Kadoya, 2021). Moreover, the experience of personal Covid-19 infection or that of someone close, as well as the loss of a close person as a result of an infection, tends to be associated with a lower level of well-being, such as a higher prevalence of depression and loneliness (Atzendorf & Gruber, 2021).

Although a pandemic will have—by its name—a global impact, its extent and response will vary nationally or even locally. In this vein, a recent study by Atzendorf and Gruber (2021) on Europeans aged 60 and over found increased feelings of depression, but not loneliness, with an increased number of Covid-19-related deaths or days of stringent policy interventions, such as stay-at-home orders. Moreover, Kim and Jung (2021) found that the level of distress from the pandemic correlated with the stringency of policy implications and the number of deaths related to Covid-19. Recent findings showed that, despite more frequent contact, there was a higher prevalence of feelings of loneliness among older adults living in Southern Europe than among those living in other parts of Europe during the pandemic (Cohn-Schwartz et al., 2022). According to Cohn-Schwartz et al. (2022), this Southern European pattern could be due to pandemic-related physical distancing, which increased individual needs and expectations for social interaction, but ultimately could not be met to the desired extent.

We combined these different streams of research and examined how individuals in later life face loneliness and its variations over time. We did so by analyzing how social contact, the use of different communication types, and their quantitative and qualitative effects increased but also decreased feelings of loneliness during the first two years of the pandemic. Thus, we contribute to research on the intersection of social contact and well-being in later life across Europe.

3. Data and Methods

3.1. Data

To answer our research questions, this study was based on SHARE (Survey of Health, Ageing, and Retirement in Europe), which provides standardized information on respondents aged 50 years or older in various European countries and in Israel. To investigate the influence of the Covid-19 pandemic on feelings of loneliness, we used a balanced three-wave panel design, considering the individual situation before and since the outbreak (for details on the data used see Börsch-Supan, 2022a, 2022b, 2022c). The first measurement point (T0) was based on the eighth regular SHARE wave, collected between October 2019 and March 2020—shortly before the outbreak of Covid-19. The second time point (T1) referred to the first Covid-19 survey as part of the eighth SHARE wave and was collected mainly between June and August 2020. Finally, the second Covid-19 survey, collected roughly one year after T1 (between June and August 2021), was used as the third-panel wave in our study (T2). Thus, our initial sample comprised only those respondents who participated at all three time points. The 27 countries that participated in all three time points were Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Israel, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Romania, Slovakia, Slovenia, Spain, Sweden, and Switzerland.

3.2. Dependent Variables

Our analyses were based on two measurements of loneliness. First, we included the general state of feeling lonely at each of the three survey times based on the following question: How much of the time do you feel lonely? All respondents were able to answer by choosing one of the following three categories: *often*, *some of the time*, or *hardly ever or never*. Second, we considered the possibility of changes in feeling lonely by comparing the answers of all respondents to the first dependent variable between T0 and T1, as well as between T1 and T2. An increase in loneliness was defined as a respondent rating their current feelings of loneliness as higher than in the previous wave (*often* vs. *some of the time/hardly ever or never*; *some of the time* vs. *hardly ever or never*). Decreased feelings of loneliness were measured in reverse logic and indicated that the respondents' current feelings of loneliness were lower than in the previous wave. Respondents who mentioned the same level of loneliness in two consecutive waves were grouped into the third category: no changes regarding

their feelings of loneliness over time. This procedure allowed us to identify variations in loneliness over time from a more objective perspective.

3.3. Individual-Level Variables

In our multivariate modeling, we tested for basic sociodemographic and economic variables, such as gender, age, health status, educational level, occupational status, and migration experience. While the respondents' gender was binary coded (male vs. female), we included age as a metric term. As physical health might be linked to psychological well-being, we considered the respondents' self-rated health conditions, ranging from *excellent* and *very good* to *good*, *fair*, or even *poor*. Education was measured based on the respondents' level of education according to the International Standard Classification of Education (ISCED) as low (ISCED 0–2: (pre)primary and lower secondary), medium (ISCED 3–4: upper and post-secondary), or high (ISCED 5–8: tertiary) education. Given that employment can affect the size of individuals' social networks, we determined their employment status (employed or unemployed/inactive) at the time of the interviews. Moreover, we considered cultural differences caused by migration and covered whether respondents were born in their country of residence (yes or no).

3.4. Social Networks and Social Contacts

Regarding the influence of respondents' social network size, composition, and interaction, we captured respondents' household size, differentiating between whether they lived alone, in a two-person household, or in a household with at least two other people. Additionally, to consider the presence of an intimate relationship within the respondents' household, we determined whether the respondents lived with a partner or not. We further included whether the respondents had at least one living parent and child residing outside their own household as potential social network members at T1 and T2.

In addition, we considered the frequency and type of interaction with the respondent's social network during the pandemic. Here, SHARE Covid-19 surveys included separate questions on personal and nonpersonal contact with social network members outside their own homes. The personal contact question was: How often did you have personal contact, that is, face-to-face, with people from outside your home? The question on nonpersonal interaction was: How often did you have contact by phone, email, or any other electronic means with people from outside your home?

For both types of communication and each group of network members (parents, children, other relatives, and nonrelatives), respondents could choose one of five frequencies: *daily*, *several times a week*, *about once a week*, *less often*, and *never*. As the interviews in T1 and T2 were conducted at different stages of the pandemic, the wording of the questions referred to different reference periods. While the first Covid-19 survey (T1) referred to the time since the pandemic outbreak, the follow-up survey (T2) asked about contact frequencies over the previous three months. Since not all potential network members were available for every respondent (i.e., parents and children), we computed three contact variables measuring the overall, personal, and electronic contact based on the most frequent contact information of all available network members. Furthermore, we measured the contact ratio by comparing respondents' personal and nonpersonal contact with the social network living outside their own household. Hence, we could differentiate whether respondents used both types of communication (personal and electronic) equally or one more frequently than the other.

3.5. Covid-19 Circumstances

In addition to the influence of social contact on the extent of loneliness, we considered specific circumstances that resulted from the Covid-19 pandemic. This included, for example, situations of extensive social distancing, meaning that respondents had never left their home (yes or no) since the outbreak of Covid-19 for T1 or during the last three months of the interview done at T2. We also considered whether respondents or anyone close to them had tested positive for the coronavirus, had been hospitalized due to the infection, and/or had died due to the infection. Each of these items was binary coded (yes or no) and referred to the period from the previous (T0 or T1) to the current (T1 or T2) wave.

In addition to the respondents' own experiences with the coronavirus, we also considered the general and contextual circumstances of the pandemic. This included the stage of the pandemic indicated by the specific SHARE wave. Moreover, we considered structural and pandemic-related differences at the country level, which might affect the extent of social isolation and, thus, levels of loneliness. Structural differences between countries and time referred to the GDP per capita (controlled for purchasing power parity) and the national-specific life expectancy at birth. All of these indicators referred to the year preceding each wave and were drawn from World Bank (2022) data. Considering the spread of the virus and containment measures of the respective governments, we further included the number of new Covid-19-related infections (seven-day average, per million), which were drawn from the Johns Hopkins University dashboard and dataset (for details see Dong et al., 2020). Based on the Oxford Covid-19 Government Response Tracker (Hale et al., 2021), we included the stringency index—rescaled to a value from 0 to 100 (strictest)—covering government policies as a reaction to contain the spread of the virus. Both indicators were entered as their average, meaning since the outbreak of SARS-CoV-2 for T1 and the last three months for T2.

3.6. Analytical Strategy

For the purpose of this study, the respondents were selected in a two-stage process. The initial balanced panel included 30,248 respondents who participated in all three waves (T0, T1, and T2), representing—under the exclusion of deceased participants between T0 and T2—almost 70% of the respondents surveyed at T0. We had to exclude respondents younger than 50 years at T0 (n = 148), those living in nursing homes during at least one wave (n = 298), and those with a missing value in one of the dependent (n = 485) or explanatory variables (n = 869). Considering these exclusions, the first sample included 85,344 observations from 28,448 respondents investigating the general state of loneliness across Europe. From this sample, we excluded all 28,448 observations referring to T0 to examine loneliness and changed loneliness since the outbreak of Covid-19 (for a descriptive overview see Table S1 in the Supplementary File). Given the hierarchical structure of the data, our multivariate analyses were based on three-level, mixed-effect ordered, and multinomial regressions (observations nested in respondents nested in countries).

4. Results

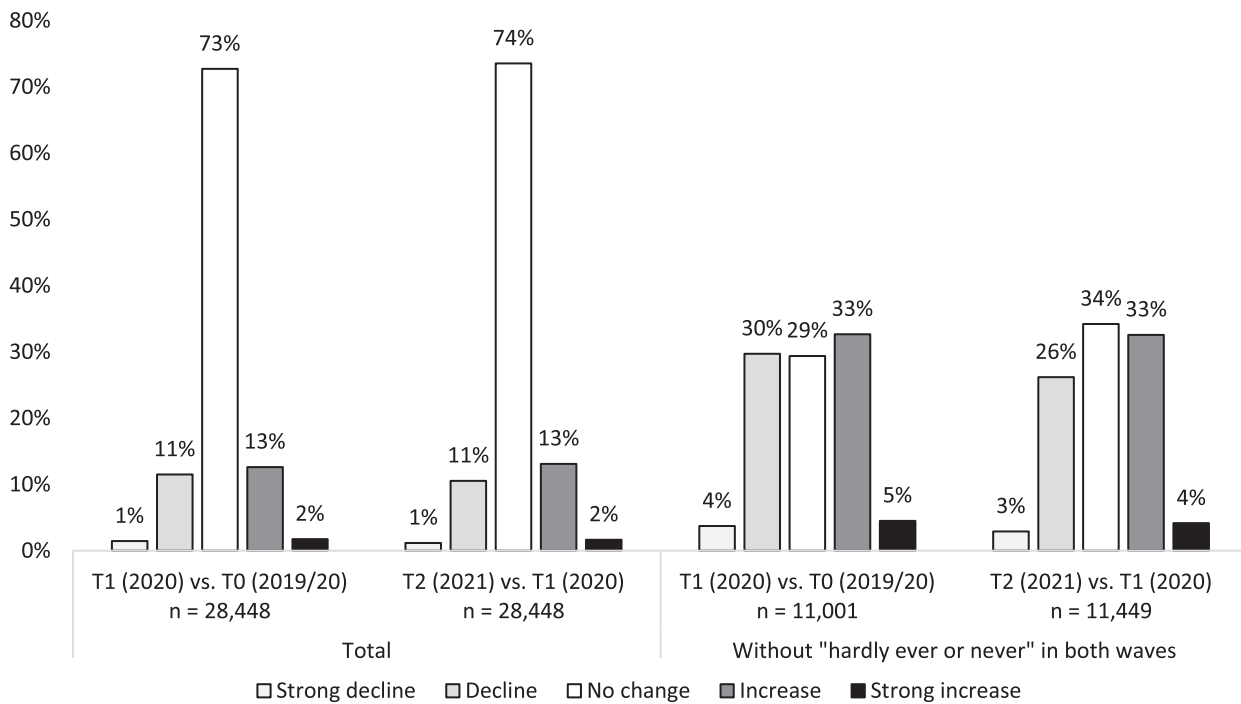### 4.1. Loneliness Before and During the Pandemic

As shown in Figure 1, most Europeans in later life did not face feelings of loneliness at either time point (before or during the pandemic). Roughly 70% reported that they had hardly ever or never experienced feelings of loneliness. However, at least 20% mentioned that they sometimes felt lonely, and 6–7% mentioned that they felt lonely often. Regarding changes since the outbreak of Covid-19, the results showed a slight but significant increase in loneliness over time (Friedman test with p = .000). Additionally, 20% of the respondents mentioned sometimes experiencing loneliness before the outbreak of Covid-19, which increased to 21–24% in 2021, while the share representing near absence of loneliness declined from 73% to 69% between T0 and T1.

Based on the longitudinal setting, the descriptive results in Figure 2 indicate that almost three-fourths of Europeans in later life reported no change in their level of loneliness in 2020 (T1) and 2021 (T2) compared with the previous year. However, the results also show that 13% rated their feelings of loneliness at T1 and T2 one level higher than at the previous time point (from *hardly ever or never* to *sometimes* or from *sometimes* to *often*). An even stronger increase—from *hardly ever or never* to *often*—was seen in 2% of the respondents in 2020 and 2021. Notably, nearly an equal proportion of older adults had the opposite experience, showing a decline (11%) or a strong decline (1%) in loneliness over the studied timeframe. In this case, there were similar proportions for both comparison times (T1 vs. T0 and T2 vs. T0), although the differences over time were statistically significant (Wilcoxon Test with p = .000). A similar picture emerged when excluding respondents who experienced hardly ever or never feelings of loneliness in either the current or previous waves. Here, the findings prove that roughly every third person was either less or more lonely
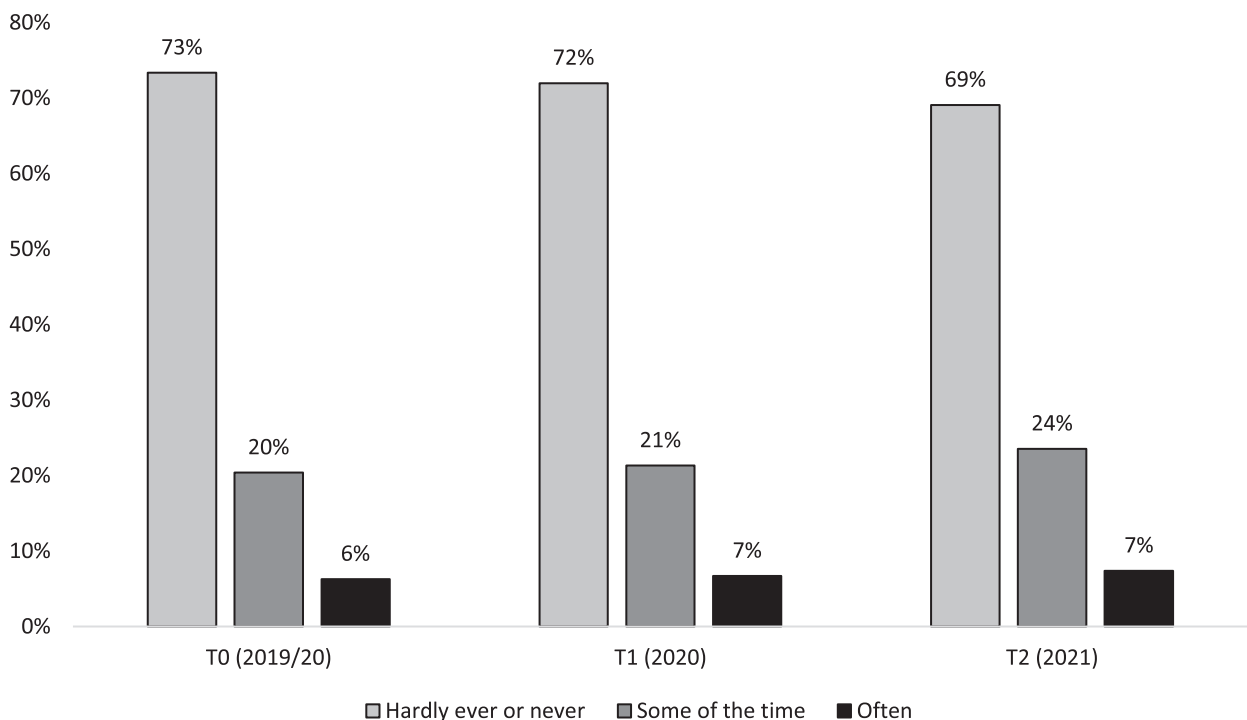
Figure 1. Feelings of loneliness before and during the pandemic. Note: N = 85,344 observations (28,448 respondents). Source: Based on SHARE waves 8 and 9, release 8.0.0.

Figure 2. Changes in loneliness during the pandemic. Source: Based on SHARE waves 8 and 9, release 8.0.0.

than or just as lonely as one year before. However, the comparison also indicates that the proportion of respondents who experienced a decline in loneliness was significantly lower at T2 compared with T1 (Wilcoxon test with p = .000).

4.2. Patterns of Loneliness

To analyze the determinants of loneliness due to the outbreak of Covid-19, several models were estimated considering individual characteristics, indicators referring to social contact, and pandemic-related circumstances. Table 1 focused on the general extent of loneliness in later life based on multilevel ordered regressions, differentiating three distinctive responses (*hardly ever or never*, *some of the time*, and *often*) and the stepwise inclusion of different contact measures.

In general, the comparison between the two samples (M0 and M1) confirmed previous findings, according to which women, the less healthy, the less educated, the unemployed (mainly pensioners), migrants, and those who live alone and especially without a partner are particularly affected by loneliness. Furthermore, the inclusion of pandemic-related events at the individual level only indirectly affected loneliness. While experiencing a Covid-19-related infection, hospitalization, or even death in one's living environment did not seem to affect loneliness, being isolated at home significantly increased feelings of loneliness. Furthermore, the availability of close family members (parents and children) did not directly affect the level of loneliness during the pandemic.

However, when patterns of social interaction were considered, specific influences on loneliness were

observed. In general, frequent and especially daily contact with social network members, such as parents, children, other relatives, and nonrelatives, outside of one's own household significantly reduced the risk of feeling lonely. Only those with no contact faced a higher risk of loneliness (M2). A similar picture emerged when considering the frequency of personal and electronic contact separately (M3 and M4). Moreover, the simultaneous consideration of both forms of communication (M5) showed the best model fit (characterized by the lowest values regarding the used information criteria), that loneliness primarily depended on the frequency of personal contact, and that electronic forms of communication were no substitute for personal exchanges. This was confirmed when the ratio of the two forms of contact was considered (M6). Therefore, it can be said that older adults who are in more electronic contact with their social network than in person or equally are likelier to experience feelings of loneliness.

Finally, it appears that contextual patterns also influence loneliness among the elderly. The findings showed that loneliness occurred significantly more frequently at the onset of the pandemic than before, but there was no difference between the two pandemic years (2020 and 2021). Considering national circumstances, the results also indicate that loneliness among the elderly generally occurs more often in countries with weaker economies (measured by GDP per capita). Regarding the average life expectancy as a proxy for the general national health system and population structure, changing effects were found. While both basic models (M0 and M1) showed a positive effect, according to which people in countries with a longer life expectancy were also more frequently

exposed to feelings of loneliness, the opposite was true when communication patterns were included: longer life expectancy accompanied less loneliness (M7), suggesting that living longer also increases the likelihood of experiencing the loss of important people and thus contact partners. Similar to personal experiences with Covid-19, national circumstances in terms of incidence and political response did not have a direct impact on the general state of loneliness (M8).

4.3. Patterns of Changes in Loneliness During the Covid-19 Pandemic

In addition to the main patterns of loneliness, we further analyzed—based on the findings in Table 1—the determinants that might have affected changes in feelings of loneliness during the first two years of the pandemic. Therefore, we deployed a multivariate setting based on multilevel multinomial regressions, whereby we investigated the influences of increased and decreased feelings of loneliness compared with respondents whose level of loneliness remained constant over time (Table 2).

While age did not directly affect changes in loneliness, the results highlighted the familiar picture, in which women, respondents with health restrictions, the less educated, and the non-employed were likelier to feel lonelier but also less lonely during the different stages of the pandemic. In addition, the findings showed that people with migration experience became less lonely during the pandemic. This phenomenon can be attributed to the fact that migrants live more often in multigenerational households (König, Isengard, & Szydlik, 2018) and are therefore less often physically alone. In addition, they are more often connected with non-co-residing family members than natives, even though they often live farther apart (König et al., 2021), meaning that they were able to establish appropriate strategies for bridging distances and maintaining contact even before the pandemic. Regarding respondents' living situations, we found that living alone could increase but also reduce feelings of loneliness in later life. A similar picture emerged for those who had isolated themselves at home.

Regarding the experience of pandemic-related events in the respondents' lives, we found that those who were infected or had someone close to them infected were less likely to show a decrease in loneliness over time. However, hospitalization or death in connection with Covid-19 showed no effects on changed levels of loneliness. The results showed that the availability of parents and children could lead to changed feelings. While having children away from home could reduce and increase feelings of loneliness, the latter was evident for those with living parents. This may have been because some parents needed special protection during the pandemic, and personal contact, informal help, and care services were not available as usual.

Regarding the role of social interactions in changed feelings of loneliness, our results showed that nondaily overall contact (M1) increased the risk of feeling lonelier. Simultaneously, respondents who were less often in contact with their social network had reduced feelings of loneliness. However, the inclusion of the contact ratio (M2) points to the importance of electronic contact for increased feelings of loneliness. In line with the findings on the general level of loneliness (see Table 1), respondents who were in contact with their social networks more often electronically rather than personally were also likelier to experience an increase in loneliness.

With the final inclusion of contextual circumstances (M3 and M4), the analyses reached the best model fit and showed that a decrease in loneliness became less likely the longer the pandemic lasted. However, the pandemic year had no direct impact on increased feelings of loneliness. According to the findings, alternating feelings of loneliness (decrease and increase) occurred significantly more often in countries with comparatively low economic power. Regarding the inclusion of the indicators for life expectancy and Covid-19-specific parameters, no substantial effects on changed levels of loneliness were found.

5. Conclusion

Loneliness—a phenomenon experienced by all age groups—can have different causes and manifestations. However, the probability of developing feelings of loneliness increases with age when one's social network size decreases and the qualitative aspects of social relationships increase in importance (Lansford et al., 1998). In this context, a pandemic could act as a catalyst for increased feelings of loneliness, as insecurities, fear, social and physical isolation due to the outbreak, and the persistence of an infectious disease can arouse or even exacerbate such feelings. As physical distancing is crucial for preventing the spread of Covid-19, many politicians and scientists have urged the population to minimize close personal contact. Hence, many Europeans began maintaining social distancing by substituting personal contact with electronic communication to have at least some contact with family and friends.

This study investigated social contact, loneliness, and their linkage during the Covid-19 pandemic using representative data from 27 European countries and Israel. The analyses indicated that most Europeans in later life did not feel lonely before or during the pandemic. However, three out of ten people, a non-negligible number of older people, were affected by loneliness. While the level of loneliness remained constant or even increased for the majority during the first two years of the pandemic, some older people were characterized by a decrease in feelings of loneliness. In general, feelings of loneliness were more pronounced among women, the less educated, the unemployed, those living alone, and those isolated at home. A similar picture emerged for a change in these feelings regarding increases and decreases in loneliness. It seems that tense or unstable

Table 1. Patterns of loneliness before and during the pandemic.

	T0–1–2	T1–2							
	M0	M1	M2	M3	M4	M5	M6	M7	M8
Men	−.291***	−.348***	−.363***	−.344***	−.357***	−.353***	−.350***	−.344***	−.349***
Age	.039*	.027	.026	.025	.027	.025	.027	.008	.024
Health (*Excellent*)									
Very good	.165**	.157*	.165*	.158	.160*	.159*	.166*	.166*	.160
Good	.411***	.433***	.429***	.441***	.440***	.436***	.434***	.439***	.430***
Fair	.716***	.780***	.796***	.807***	.785***	.802***	.789***	.794***	.775***
Poor	1.169***	1.345***	1.356***	1.374***	1.34***	1.366***	1.357***	1.352***	1.333***
Education (*Low*)									
Medium	−.134***	−.150***	−.117***	−.111**	−.120**	−.112**	−.126***	−.138***	−.131**
High	−.204***	−.220***	−.169***	−.187***	−.189***	−.183***	−.198***	−.190***	−.202***
Employed	−.070**	−.122***	−.080**	−.069*	−.110**	−.065*	−.093**	−.084**	−.093**
Migrant	.138**	.104*	.123**	.110*	.076	.106*	.099*	.075	.095*
Household size (*Alone*)									
2 persons	−.375***	−.440***	−.456***	−.429***	−.446***	−.437***	−.427***	−.430***	−.427***
3 and more persons	−.497***	−.549***	−.567***	−.505***	−.559***	−.519***	−.511***	−.510***	−.509***
Lives with partner	−.894***	−.899***	−.900***	−.932***	−.894***	−.926***	−.923***	−.930***	−.924***
Never left home			.142***	.138***	.121***	.137***	.125***	.152***	.140***
COVID-19 (Infection)			.013	.029	.013	.028	.025	−.010	−.003
COVID-19 (Hospitalization)			.063	.057	.058	.059	.058	.061	.056
COVID-19 (Death)			.045	.058	.064	.057	.052	.053	.049
Parent(s)			.041	.046	.037	.047	.042	.050	.055
Child(ren)			.049	.041	.026	.055	.053	.044	.049
Contact: Overall (*Daily*)									
Several times a week			.138***				.127***	.136***	.127***
About once a week			.195***				.188***	.201***	.188***
Less often			.223***				.248***	.273***	.252***
Never			.296				.339	.336	.343
Contact: Personal (*Daily*)									
Several times a week				.123***		.122***			
About once a week				.248***		.243***			
Less often				.265***		.258***			
Never				.236***		.230***			

Table 1. (Cont.) Patterns of loneliness before and during the pandemic.

	T0–1–2		T1–2						
	M0	M1	M2	M3	M4	M5	M6	M7	M8
Contact: Electronic (*Daily*)									
Several times a week					.065**	.039			
About once a week					.096***	.057			
Less often					.133***	.093*			
Never					.100	.085			
Contact ratio (*Same*)									
More personal							−.019	−.022	−.019
More electronic							.114***	.136***	.128***
Wave (*T0—2019/2020*)									
T1—2020	.084**								
T2—2021	.177***	.025						−.056	.063
GDP per capita	−.085***	−.289***					−.534***		
Life expectancy	.136***	.076***					−.264***		
New infections									−.017
Stringency index									−.029
Observations	85,344	56,896							
Respondents	28,448	28,448							
Countries	27	27							
−2LL (Intercept only)	111,568	78,483							
AIC (Intercept only)	111,576	78,491							
BIC (Intercept only)	111,613	78,527							
−2LL	103,655	71,536	71,414	71,322	71,466	71,338	71,368	71,422	71,345
AIC	103,697	71,576	71,468	71,376	71,520	71,400	71,426	71,486	71,409
BIC	103,894	71,755	71,709	71,618	71,761	71,678	71,685	71,772	71,695

Notes: Multilevel ordered regressions and regression coefficients displayed; robust standard errors; −2LL stands for −2 log-likelihood; AIC stands for Akaike information criterion; BIC stands for Bayesian information criterion; significance levels: *** $p \leq .001$, ** $p \leq .010$, * $p \leq .050$. Source: Based on SHARE waves 8 and 9, release 8.0.0.

Table 2. Patterns of changed loneliness since the outbreak of Covid-19.

	M1 Decline	M1 Increase	M2 Decline	M2 Increase	M3 Decline	M3 Increase	M4 Decline	M4 Increase
Base category				No change				
Men	.746***	.679***	.747***	.691***	.746***	.690***	.744***	.690***
Age	1.002	1.005	1.008	1.013	1.011	1.011	1.014	1.016
Health (*Excellent*)								
Very good	1.233*	1.385**	1.237*	1.390**	1.253*	1.394**	1.254*	1.401**
Good	1.717***	2.054***	1.691***	2.032***	1.696***	2.029***	1.708***	2.042***
Fair	2.250***	3.120***	2.238***	3.110***	2.203***	3.036***	2.305***	3.157***
Poor	2.537***	4.738***	2.521***	4.759***	2.521***	4.686***	2.655***	4.868***
Education (*Low*)								
Medium	.848***	.886**	.833***	.866***	.836***	.882**	.840***	.865***
High	.749***	.846**	.766***	.858**	.748***	.847*	.774***	.858**
Employed	.761***	.823***	.770***	.843**	.748***	.823***	.763***	.837***
Migrant	1.331***	1.111	1.363***	1.126	1.326***	1.102	1.375***	1.126
Household size (*Alone*)								
2 persons	.884	.784**	.865	.778**	.866	.780***	.863	.778***
3 and more persons	.756***	.710***	.719***	.697***	.719***	.698***	.716***	.699***
Lives with partner	.339***	.391***	.344***	.389***	.346***	.387***	.345**	.390***
Never left home	1.28***	1.276***	1.262***	1.255***	1.217***	1.229***	1.218**	1.237***
Covid-19 (Infection)	.806***	.867**	.806***	.872**	.877**	.912	.866**	.896
Covid-19 (Hospitalization)	1.058	1.122	1.071	1.131	1.075	1.134	1.074	1.135
Covid-19 (Death)	.925	1.029	.926	1.031	.944	1.043	.932	1.035
Parent(s)	1.188**	1.151*	1.186**	1.155*	.993	1.151*	.995	1.141*
Child(ren)	1.015	1.169**	1.004	1.152*	1.177**	1.152*	1.169*	1.149*
Contact: Overall (*Daily*)								
Several times a week	1.036	1.100*	1.036	1.085	1.048	1.106*	1.037	1.081
About once a week	1.132	1.159*	1.128	1.147*	1.153	1.182*	1.129	1.139*
Less often	1.483***	1.305**	1.480***	1.331**	1.484***	1.356**	1.463***	1.316**
Never	1.110	.872	1.036	.901	1.115	.902	1.114	.896
Contact ratio (*Same*)								
More personal			1.014	.931	1.032	.954	1.017	.930
More electronic			1.020	1.133***	.987	1.118**	.986	1.115**
Wave (*T1—2020*)								
T2—2021					.829***	.925	.768**	.834
GDP per capita					.911**	.885***		
Life expectancy					.932	.965		
New infections							1.071	1.072
Stringency index							1.014	.986
Observations	56,896							
Respondents	28,448							
Countries	27							
−2LL (Intercept only)	83,201							
AIC (Intercept only)	83,209							
BIC (Intercept only)	83,245							
−2LL	80,741		80,711		80,660		80,677	
AIC	80,841		80,819		80,780		80,797	
BIC	81,288		81,302		81,317		81,334	

Notes: Multilevel multinomial regressions and relative risk ratios displayed; robust standard errors; −2LL stands for −2 log-likelihood; AIC stands for Akaike information criterion; BIC stands for Bayesian information criterion; significance levels: *** $p \leq .001$, ** $p \leq .010$, * $p \leq .050$. Source: Based on SHARE waves 8 and 9, release 8.0.0.

equipment or resources (e.g., economically, in terms of health, but also socially) are associated with more instability. Conversely, men, the more educated, the healthier, the employed, and those who did not live alone had fewer fluctuations regarding feelings of loneliness.

While pandemic-related events at both the individual and national levels had less of a direct impact on the extent and changes in loneliness, the form and intensity of social contact had a direct impact. This was reflected in the fact that social distancing, and thus the "waiving" of frequent personal contact, was associated with increased loneliness. At the same time, more electronic contact was clearly no substitute for face-to-face interactions in overcoming loneliness later in life; loneliness increased, particularly in those who had a potential social network (e.g., parents and children) but with whom there was less personal contact and more often a physical, and therefore emotional, distance.

However, some limitations should be considered when interpreting this study. Although the dataset was based on a longitudinal design, the respective points in time of the two Covid-19 surveys could also have affected the response behavior and thus the extent of loneliness reported. In addition, the measurement of loneliness was based on a single question and limited to three response options. Here, a differentiated measurement of loneliness, such as the UCLA Loneliness Scale (see Russell et al., 1980), would be more appropriate for addressing the complexity of loneliness. Although the two SHARE Covid-19 surveys specifically asked about individual changes concerning loneliness during the pandemic, we used an indirect comparison based on the current level of loneliness. This was mainly because the questionnaire directly asked for changed feelings of loneliness due to Covid-19, which might have influenced possible response behavior, and the corresponding question was not answered by the same target group due to different routing procedures between the surveys.

Finally, our results showed that most adults in later life are not affected by loneliness. Nonetheless, a significant proportion of the elderly population face loneliness, which has been increased by the pandemic. In this context, our findings show that the importance of social contact for loneliness is determined by the frequency and type of communication. While social distancing can protect physical health during a pandemic, it can also harm mental health. It is therefore important to consider and protect health in all its facets—in a pandemic, but also beyond.

Conflict of Interests

The authors declare no conflict of interest.

Supplementary Material

Supplementary material for this article is available online in the format provided by the author (unedited).

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Article

Gender Differences in Epidemic Everyday Scenarios: An Exploratory Study of Family Life in Slovenia

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Abstract
The article focuses on the changed dynamics of family life due to the first wave of Covid-19—starting in the spring of 2020—and the consequent longstanding social lockdown in the fall of 2020. We employ the concept of "forced nuclearisation" to describe the process that required a rapid reorganisation of otherwise self-evident and established social patterns and relationships, above all new adjustments of care relations both inside and outside the private sphere. The focus is on new demands in the intertwined spheres of work, school, and family obligations, especially because the private sphere has been assigned several additional functions, otherwise carried out by educational and daycare institutions. Based on an extensive dataset from a quantitative exploratory online survey conducted in two time periods, first in April 2020 and then in October 2020, this article discusses, from a comparative perspective and with a focus on gender inequalities, the main changes in practices and everyday routines such as shopping, housework, childcare, work obligations, and caring for other family members. The research aimed to identify the most obvious distinctions in family scenarios and, in particular, to point to the main social inequalities and potentially vulnerable groups within the population, who faced the forced and unexpected nuclearisation of everyday life.

Keywords
Covid-19; epidemic scenarios; family; forced nuclearisation; gender; lockdown; quantitative analysis; social inequalities; survey research

Issue
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1. Introduction

During the Covid-19 pandemic, Slovenia faced health, social, and economic challenges. From mid-March to the end of May 2020 (the pandemic officially began on 12 March and ended on 31 May 2020), the Government of the Republic of Slovenia took a series of measures that inevitably intervened in private lives, significantly changing previous everyday practices. The situation was repeated in the fall of 2020, more precisely from October 2020 to June 2021 (the second wave lasted from 19 October 2020 to 15 June 2021), with the important dif-

ference being that the period of special measures and, in particular, the lockdown was significantly longer than in the first wave.

In both periods, the government restricted people's physical mobility, while several institutions, including educational institutions, were completely closed. Freedom of movement was limited to municipal boundaries and social contact with household members. Work activities, as well as school and study obligations, were shifted to the private sphere. Slovenia is one of the countries where the "distance learning/education" model has been in place the longest. In the second wave, only some

of the youngest pupils (from the first three grades of education) returned to school after three months of distance education, while the rest of primary school pupils and senior secondary school students gradually returned to school after more than four or five months. The rest of the secondary school students did not return to school until mid-May, while university students were mostly back only by the end of the pandemic, in June 2021.

Although the actions taken during the two waves of the epidemic were similar, there were differences in how people reorganised everyday life and how they perceived the state of emergency. While the first wave came with a shock, requiring a very rapid reorganisation of everyday life, the second wave was (based on epidemiological forecasts) somewhat expected. However, while people were able to form everyday routines based on the experience of the first wave, the second period of restrictions and necessary lockdown brought about many pressures because it lasted for several months and the measures were quite restrictive.

Using data from two quantitative exploratory surveys—the first conducted during the spring lockdown and the second during the fall lockdown—in this article we are interested in the resulting changes in the intra-dynamics of everyday life, that is, in how families have perceived, responded to, and coped with challenges of extraordinary circumstances. In other words, how the measures taken during the lockdowns influenced everyday dynamics within families, the division of family labour, existing patterns and habits, and to what extent they affected interpersonal relationships and experiences. We hypothesised that adapted everyday "family practices" (Morgan, 2011) have emerged, which have allowed families to perform core functions while taking on functions that are otherwise the responsibility of other institutions in the public sphere. It can be argued that families responded relatively quickly by being tactically resourceful in developing adapted everyday practices (cf. de Certeau, 2007), especially those related to re-organisation and integration of family and work obligations within the private sphere.

We strive to point to key gender differences and inequalities within the changed family life that most likely emerged as a result of the new social circumstances of everyday life. We assumed that the lockdowns even deepened existing inequalities and increased family vulnerability (Widmer et al., 2020). The focus was on how practices such as shopping, housework, home and garden management, childcare, work obligations, and also care for other family members changed, and to what extent. We paid attention to the comparison of the two waves of the pandemic in the spring and fall of 2020 and gender differences as a key structural dimension of the division of family labour. At the same time, we focused on perceptions of how the epidemic has changed family relationships and general well-being. Since any analysis of gender inequalities within the family should also bear in mind other structural factors that inevitably create (experiences of) social inequalities (cf. Thorne & Yalom, 1992), we also tested some other possible factors that created social inequalities among families.

2. Everyday Life in the Lockdown Context

The lockdowns caused the breaking of many social ties, especially of care relationships with relatives outside the family. This was especially problematic because extended family (especially grandparents) is an important source of informal support in reconciling work and family life in Slovenia (Rener et al., 2006). Literally overnight, parents were fully occupied not only with their work and other daily duties but also with functions otherwise performed by schools, kindergartens, paid services for domestic and care work, etc. It should also be considered that parents in Slovenia are, in general, already to a great extent burdened with the social pressures of the culture of child-centredness and protective childhood (Švab, 2017), and consequently play an important part in children's educational trajectories in instrumental and emotional ways (Živoder & Ule, 2020). It could be claimed that these pressures even increased in light of (health and other) uncertainties that arose when parents took over the functions carried out by educational institutions. Meanwhile, for many parents, the work sphere has also colonised the sphere of the home, as many parents have taken up remote work alongside these new care and educational responsibilities.

The epidemic restrictions caused what we call "forced nuclearisation" (Oblak Črnič & Švab, 2020), a process in which families (predominantly of the nuclear type of two-generational families of parent[s] and their children) were forced to physically limit their everyday life to the household and consequently cut off social relationships outside the family. Everyday family life was marked by closure and withdrawal from the outside social world (cf. Kellerhals et al., 1992; Widmer et al., 2020) and this process not only physically, but also symbolically reinforced the boundaries between the family and the outside world and therefore strengthened the ideology of the nuclear family. In forming various preventive measures, the government, together with various institutions (care and educational ones), unreflectively built upon the idea of the nuclear family as a self-sufficient institution with clear boundaries and did not in any way question problematic gender asymmetric division of family labour, the relocation of care and educational functions—otherwise carried out by institutions, such as kindergartens and schools—nor did they acknowledge the importance of extended family, especially grandparents, in care activities.

Forced nuclearisation revealed a sort of peculiar paradox of the very perception of the (nuclear) family as an isolated and self-sufficient entity with distinctive boundaries that separate it from its social environment. Namely, through this process, it became even more evident that the nuclear family is in no way self-sufficient,

nor is it an entity separated from other (private and public) spheres (as often ideologically pictured). On the contrary, it became even more obvious how much it depends on social ties beyond its boundaries. It became clear that relationships, especially care relationships, are built mutually, offering support, and receiving it from wider kinship networks as well as social-educational and other institutions. That the relationship with the outside world was important to families during the pandemic lockdowns could be observed, for example, through the strategies used by families that enabled openness to maintain at least minimal contact with the school, friends, and relatives through the use of the internet (Widmer et al., 2020).

Another problematic consequence of the governmental actions in the process of forced nuclearisation is the fact, that it reinforced the idea of the nuclear family as a unified entity (e.g., "we are all in the same boat"-type of arguments), denying differences in subjective experiences and social inequalities within the family and between families.

Forced nuclearisation further meant that a kind of social experiment was taking place on both macro and micro levels (Oblak Črnič & Švab, 2020), in which people had to reframe their everyday life (Risi et al., 2021) and adopt more fusional functioning (Widmer et al., 2020). Residential environments as inherently private and intimate spaces became internally hybridised as work and education became, for an indefinite period, an inevitable part of private everyday life while households became externally disintegrated and atomised. One can even speak of "a radical transformation of the space-time of everyday life" (Fuchs, 2020, p. 378).

Everyday life, otherwise characterised by routine and self-evidence, was changed in such a way that individuals were confronted with numerous challenges and demands that required a rapid reorganisation of the most taken-for-granted and established patterns of behaviour and relationships (Oblak Črnič & Švab, 2020; cf. Fuchs, 2020). First and foremost, this required adaptations of care relationships both within and outside the household. Parents were probably among the most stressed due to the collision of activities from both private and public spheres, which are usually separated both spatially and in terms of the temporal structuring of everyday life.

We cannot ignore the fact that the changed circumstances were situated in existing (structurally determined) social contexts that are characterised by various otherwise existing forms of inequality within the family. This is primarily the prevailing gender asymmetric division of family labour and the consequent problem of the reconciliation of family and work obligations, which the epidemic put into a whole new perspective. The existing research on the gender division of family labour during the epidemic also confirms this (Vuga Beršnak et al., 2020; Chung et al., 2021; Fodor et al., 2021; Hipp & Bünning, 2021; Oblak Črnič & Švab, 2020; Zoch et al.,

2021), with differences observed both at the level of division of labour and at the cognitive level (Czymara et al., 2021). Single mothers in particular faced even more specific challenges and pressures in this respect, which was confirmed by two (USA and Canadian) studies (Hertz et al., 2020; Pino Gavidia et al., 2022).

As in other Western countries (see, e.g., Bornatici & Heers, 2020; Szalma et al., 2020; Ukhova, 2020), there was a gender asymmetric division of family labour present in Slovenia before the epidemic (Kanjuo Mrčela et al., 2016), and fathers were involved in childcare only partially, as a supportive model of fatherhood prevailed, where men were involved mainly in an assisting role, while women did most of the family labour (Rener et al., 2008). Although paid domestic labour is becoming increasingly actual in Slovenia as well (Šadl, 2006), its use is limited to urban areas and accessible only to those with enough financial resources. Therefore, it is more common that people rely on unpaid informal support offered by relatives, especially grandparents, and sometimes friends. Although there is no data available regarding if or to what extent the paid domestic work was used by families during the lockdowns, we can speculate that this source of help was radically limited for various reasons, as movement outside the home was very limited due to the strict governmental measures regarding the epidemic.

We hypothesised that these patterns of gender asymmetric division of family labour have become even more pronounced during the epidemic and involve multiple burdens, especially for women. This most likely led to tensions and stressful situations that were exacerbated by a lack of personal space for retreat, work, study, and the lack of sources of formal and informal support. Research shows that during the epidemic, women and mothers in particular were less satisfied than men or people who do not have children (Czymara et al., 2021; Hipp & Bünning, 2021).

3. Investigating Family Life During the Epidemic: Research Design, Methods, and Sample

The epidemic shook the prevailing modes of empirical research on social phenomena profoundly, especially in terms of access to the subjects of analysis. In the first spring wave, when remote work was just beginning to take hold, researchers more often turned to research methods that were already prepared for remote data collection. The Faculty of Social Sciences at the University of Ljubljana has a long tradition of online surveys (Callegaro et al., 2015), which have proven to be one of the most appropriate forms for collecting population data, including in the case of research on everyday family life.

A quantitative survey was conducted in two time periods: first in April 2020 (the first wave of the pandemic) and then in October 2020 (the second wave). Both times, the survey was conducted via Valicon's JazVem.si web panel, the largest online panel of respondents in

Slovenia. The first measurement included a larger ad hoc sample of 2,127 adult respondents, while the second measurement included only 534 respondents. The first sample was part of a large-scale survey, which was conducted in three-time waves within one month period, while the sample in October is a result of a single survey, conducted in only three days. Because the article here is deliberately limited to respondents with children in both surveys, the subsamples used are smaller in both periods—1,399 participants with children participated in April, and only 364 in October. Nonetheless, the samples in both surveys are quite similar in terms of key demographic characteristics.

Thus, 54% of men and 52% of women participated in the April survey and 52.4% of men and 47.6% of women participated in the fall survey. The majority of respondents in the April measurement were married (58%) or in an extramarital cohabitation (24.7%), as well as in October: The majority of respondents were married (60%) and 21.3% lived in an extramarital cohabitation. In both surveys, the majority of respondents were employed (54% of the April sample and 52% of the October sample). Only in terms of age structure is there a greater variation between the two samples in favour of the younger sample in the fall measurement: While the majority of respondents in April were 51–65 years old (40.7%) and about a third (34.1%) were 36–50 years old, only 16% were young (21 years or younger). In October, most respondents in the sample were between 36 and 50 years old (37.6%) and nearly one-third (29.3%) were under 21 years old, while adults between 51 and 65 years old make up one-quarter of the total (25%). Current national statistical data show that 64% of the Slovene population is between 15 and 65 years old, 21% of the population is over 65 years, and 15% of the population is between 0–15 years old (SORS, 2022). In terms of household size, the two samples are more similar: The majority of households were either two-person households (27.3% in April vs. 30.6% in October) or three-person households (26% in both surveys), while a quarter (24.2% vs. 24.9%) were four-person households. The samples are also similar in terms of the educational structure, with respondents with a four-year secondary education predominating in both measures (50% vs. 47%), followed by those with elementary or vocational education (24% vs. 28%).

For this article, we focused on data on everyday practices during the spring and fall lockdowns and the perceptions of relationships and personal well-being in lockdown. We sought to identify changing practices by asking questions about the intensity of particular tasks or practices, and we were particularly interested in gender differences in the division of family labour, care of other relatives, and care of one's own health. The second domain measured changes in attitudes and well-being using questions on self-assessment of general well-being, mental and physical health, and perceptions of relationships with spouses, children, parents, friends, neighbours, and colleagues. Consequently, the data analysis is conducted in two thematic strands: first, we focus on the changed practices of everyday life during the lockdown period, and second, on attitudes and perceptions of new circumstances. Statistical analysis of the data is both univariate and bivariate, mostly using ordinal variables. Associations between variables are tested using the Chi-square test and, in some cases, Spearman's correlation coefficient. The results are representative of the Slovenian online population aged 18–75 by gender, age, education, and region.

4. Results

We assumed that families were already under significantly greater pressures and strains due to their existing roles and the assumption of new functions otherwise performed by care and educational institutions during the lockdown period. Given existing gender inequalities in the division of family labour and work-life balance (Szalma et al., 2020), we assumed that these patterns were exacerbated during the epidemic, resulting in multiple burdens, particularly for women: not only domestic and care work, but also home-based education and work responsibilities.

Before turning to the analysis of the subsample of families, it is important to know the trends in the overall sample. First, we examined the effects of lockdown in April (Figure 1) and October 2020 (Figure 2), as they reveal two things: First, how already in the first wave of the epidemic certain practices simply receded from everyday life and, on the contrary, certain practices intensified. Secondly, we analysed which of these changes were characterised by a more sustained intensity or vice versa. The survey question in the survey was: How does self-lockdown affect your habits and activities, both in the home and in the wider community, compared to before? Do you do the following things less frequently or more frequently/intensively?

The main deficits in April 2020 (Figure 1) were at the level of social contact and all activities related to physical mobility outside the home: There was a significant decrease in social contact with friends (74.6%) and relatives (64.5%) and with colleagues (70.2%). Work commitments were also rated as less intense than usual during the epidemic by 37.2% of respondents. On the other hand, there was a significant increase in housework (20.7%), especially cleaning up the house and garden (25.2%), which is to be expected given the spring epidemic and reduced opportunities for exercise and travel. At the same time, there was a significant shift in daily routines toward more attention to self (14.7%) and health (15.1%), which may indicate that the global disease situation has also brought an increased awareness of the importance of one's own well-being and health.

In October 2020 (Figure 2), most of the changes continued, but with some differences: Relationships with relatives, work colleagues, and friends were predominantly
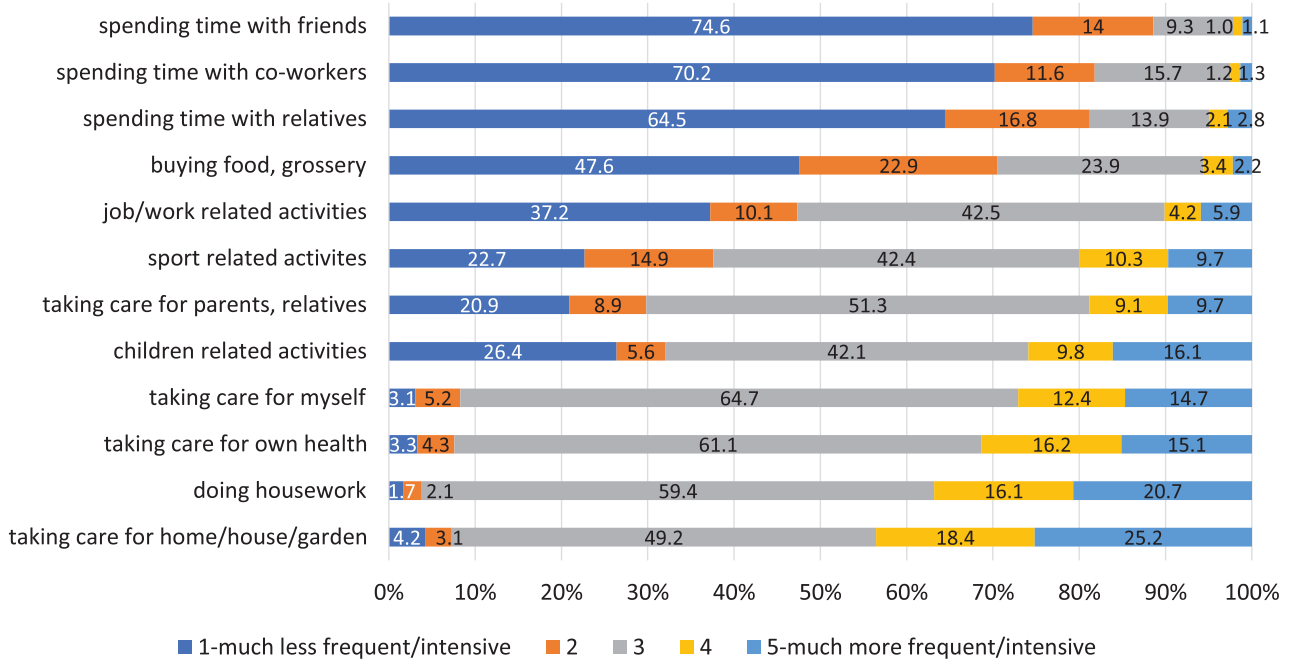
Figure 1. The effects of lockdown on everyday practices and activities (in percentages, April 2020).

less frequently maintained, while activities related to home and garden management (61.9%) or housework (66.5%) remained more or less the same. The intensity of caring for one's health (61.3%) and personal care (61.6%) also seem to remain the same. However, some other activities have become more flexible, such as grocery shopping, sports, or professional activities. Here, the sample is more diverse, although for the majority of respondents both activities have remained more or less the same. Caring for parents or dealing with children seems to have remained the same for at least part of the

sample, but for another part of the respondents, it has intensified (10%) or even decreased (19.7%).

The question is how families coped with pressures and constraints. In particular, we were interested in how gender differences within families manifested in each wave of the epidemic and what activities and conditions affected family life in the longer term. In what follows, therefore, we show how these practices and trends were distributed exclusively among households with children, as illustrated by gender differentiation in both periods. We focus in particular on changes in household and
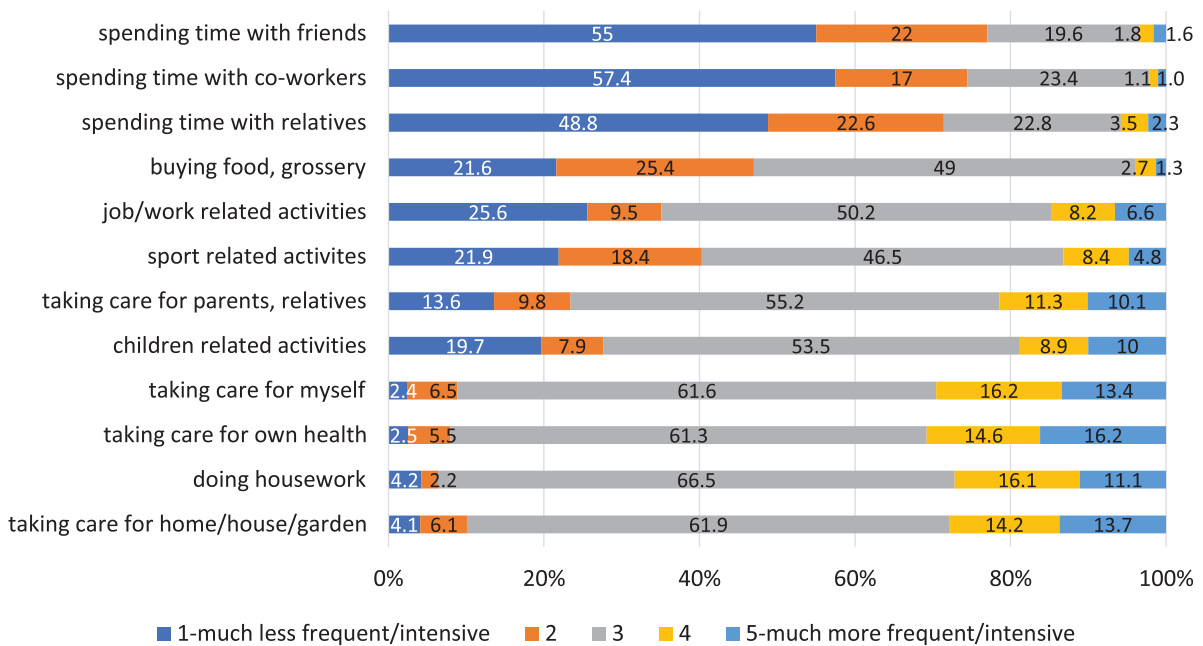

Figure 2. The effects of lockdown on everyday practices and activities (in percentages, October 2020).

caregiving tasks, as it is not insignificant how families managed work and family obligations.

4.1. Changing Everyday Practices of Families

The potential changes within the families in both periods were, in a statistical sense, analysed using the method of cross-tabulations with Chi-2 tests. In this way, the relationships between the chosen variables, which have a primarily ordinal scale, and gender, which is a nominal variable, were tested (using two-tail statistical significance $p \leq 0{,}001$). For all the considered comparisons taken into account, findings which showed statistically significant distinctions in terms of gender differences are primarily presented. Where this was not the case, the data are interpreted accordingly to statistical tests.

In terms of family labour, data show some differences between the two epidemic waves and according to the gender of the respondents. In April 2020, women were significantly more burdened with housework (Figure 3): As many as 28% reported that their workload was much greater (compared with 14% of men); the Chi-2 test value was 46.26. In contrast, in the second wave, both genders reported equal workloads (71% of men and 72% of women); here the Chi-2 test was 13.89. Thus, housework hit women particularly hard in the spring, when altogether 41% of women reported housework was more intensive than before the epidemic lockdown. Moreover, home and garden management (Figure 4) were also significantly more stressful for women in wave 1, with 31% doing it more intensively than before (compared with 23% of men); here, the Chi-2 value in April was 17.44, while in October was a bit higher, 26.47. Thus, families maintained trends and rules of domestic responsibilities through home and garden management that were identical to the existing gen-
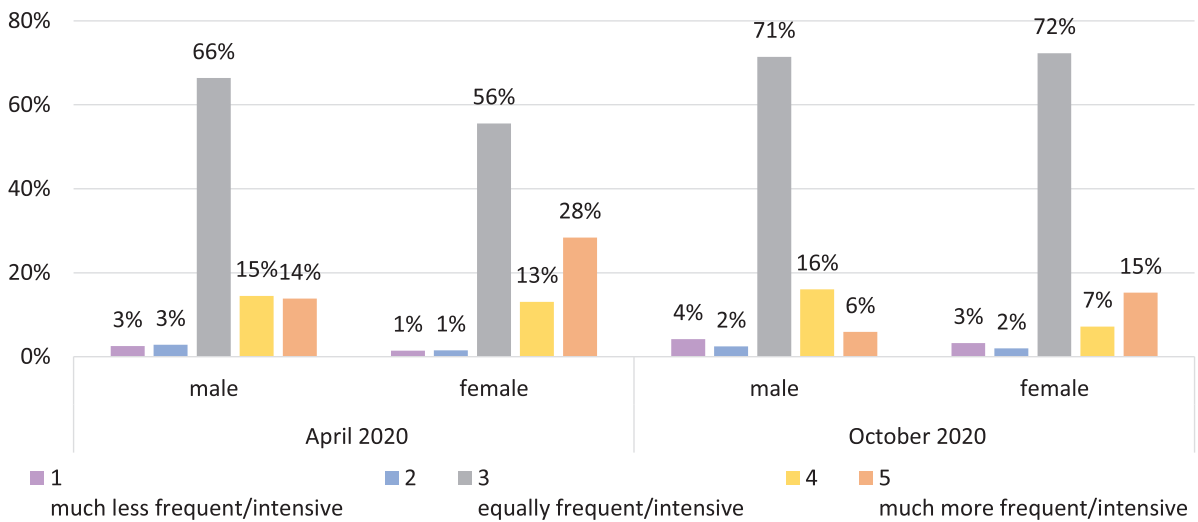

Figure 3. Housework by gender in two epidemic waves.
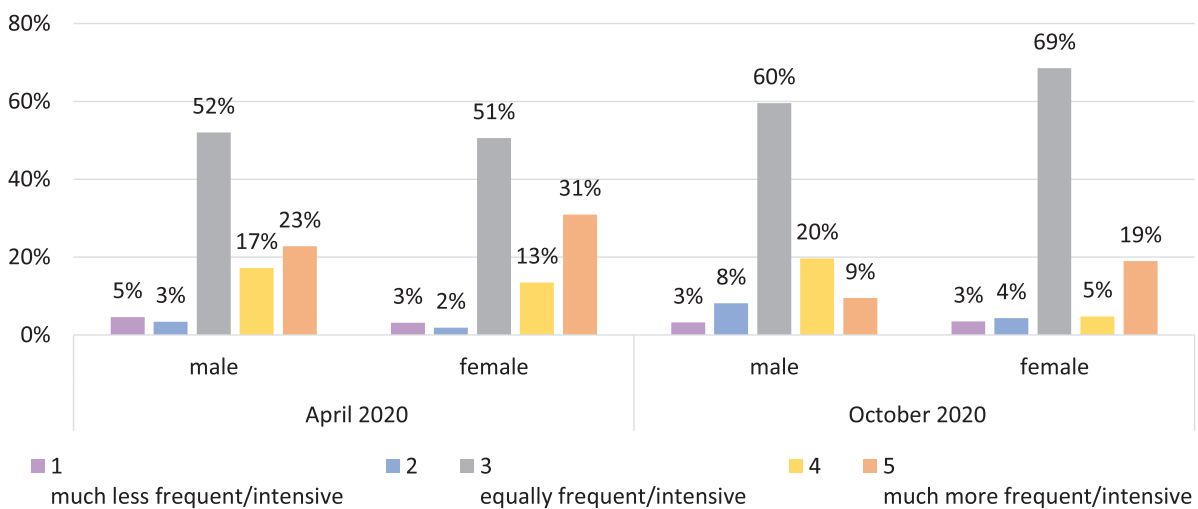

Figure 4. Home and garden management by gender in two epidemic waves.

der division, and it could be argued that the epidemic did not significantly change these, but only increased the pre-existing burden of women.

Similarly, but in some places much more diversified, families faced childcare (Figure 5): 42% of male respondents felt that it was equally intensive during the epidemic, with 19% of men indicating that it was more intensive than before. The Chi-2 value in April was 21.53. However, a quarter of women (26%) agreed that childcare was more intense during the first period of lockdown. In addition, a fifth of men (20%) indicated that occupation with children was less intense than before, in comparison to 24% of women. It seems that at least for some small part of the sampled respondents, childcare was not the most demanding obligation during the lockdown. However, when measured in October, practically both genders estimate that engagement with children has remained the same—50% of men and 48% of women agree; here the Chi-2 value was almost identical, 21.27. Nevertheless, the distribution of perceived inten-

siveness with childcare remained unequally reported between both genders, but also within single gender as well.

In addition to duties and obligations at home and childcare, we also used the same set of questions to assess changes in the intensity of other obligations. For example, there were already clear gender differences in the assessment of work obligations (paid job) in wave 1: 49% of women (compared to 30% of men) reported having fewer work obligations, while significantly more men (50%) than women (34%) reported having the same number of work obligations as usual. In October, the gender ratio remains the same, except that the percentage of women who expect to have fewer work obligations is slightly lower (35% of women vs. 23% of men).

A similar pattern emerges in the assessment of care for elderly end relatives, except that women reported having fewer obligations in this field than before the epidemic; in April, the Chi-2 value was 27.00, while in the October test it was 10.87 (Figure 6).
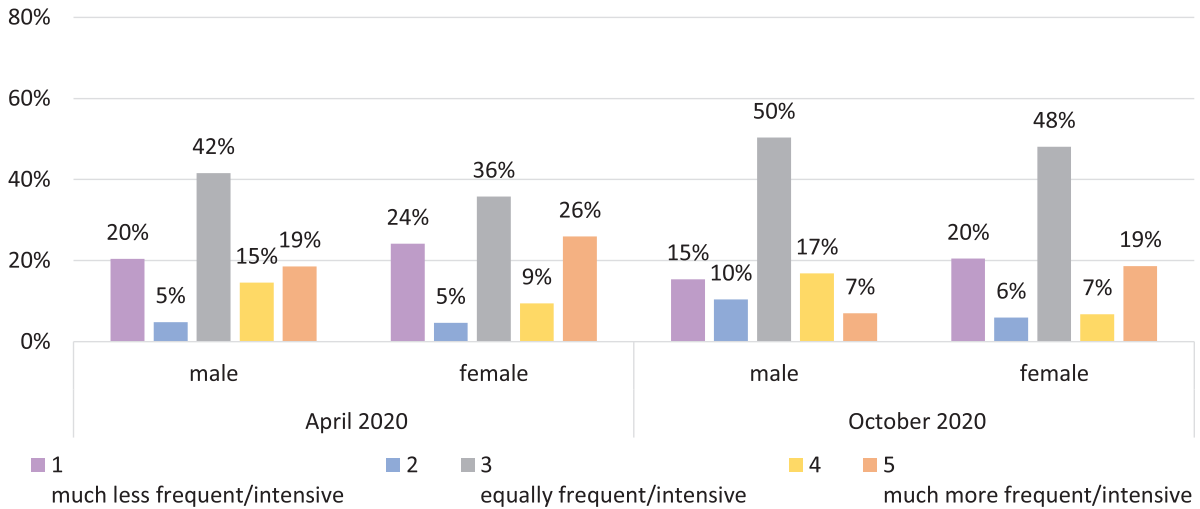

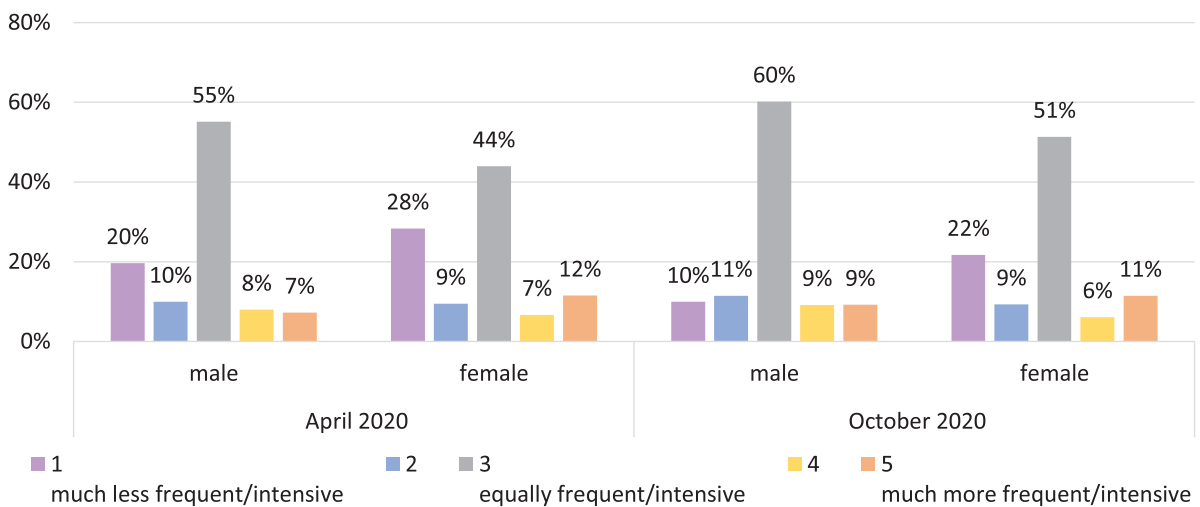**Figure 5.** Childcare by gender in two epidemic waves.

Figure 6. Care for elderly and relatives by gender in two epidemic waves.

In April, the majority of men estimated their workload with care for the elderly and relatives to be the same (55%) or lower (20%), while only 44% of women estimated it to be the same and 28% of women estimated their parental workload to be lower. In October, the situation became even more "normal" or equal for men (60%), but this is also partly the case for women (51%).

4.2. Relationships and Personal Well-Being

We were also interested in possible changes in relationships with children and partners, as family life has become physically confined to the home and constant contact with family members has become much more inevitable. However, data on relationships with children in the family (Figure 7) show that the situation is practically very stable in both periods and is also practically the same by gender: 69% of men and 67% of women consider the relationship to be unchanged, with the proportion of men having fallen only slightly in October (to 65%). Also, in terms of statistical differences, this is one of the rare cases which showed no significant differences

between both genders. That the relationship has worsened is, apparently, very rare and for some it is even evident that it has improved, which is also fairly consistent between genders. The assessment of the relationship between partners (Figure 8) was even more stable: In the spring, 73% of men and the same proportion of women (73%) rated the relationship as stable. In the second fall wave, only slightly fewer women answered that the relationship was the same (69%). Statistically, this comparison between the genders in both periods showed no actual significance.

The extent to which the experience of lockdowns has affected men and women differently can also be inferred from data assessing general well-being and health. We asked a series of questions about the possible effects of lockdown on various things or conditions, particularly relationships, health, etc. Respondents answered on a scale from 1 to 5, with possible answers being that the situation or attitude has gotten much worse (1) or worse (2), stayed about the same (3) or improved (4), or gotten much better (5). The majority of respondents felt that overall well-being had remained
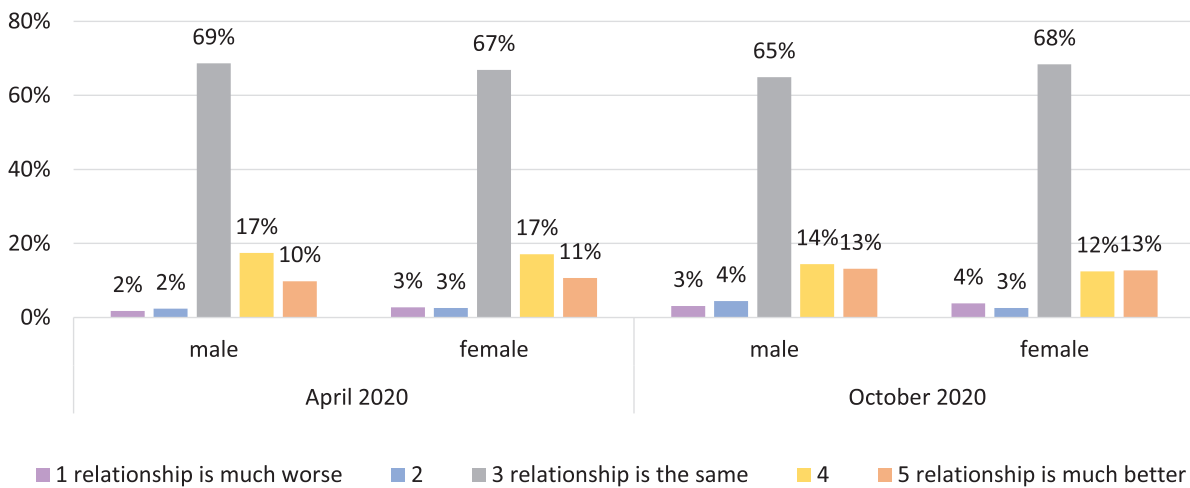

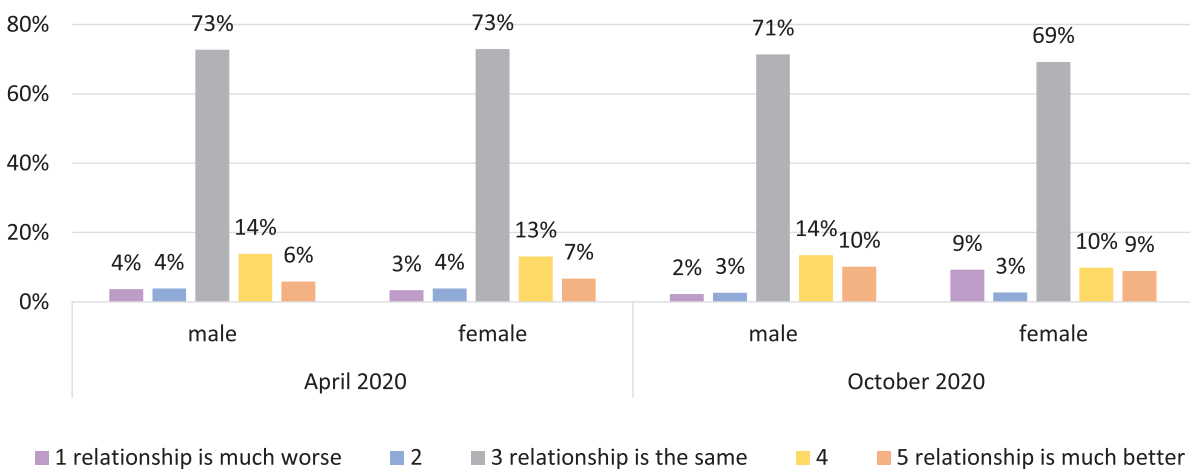**Figure 7.** Relationship with children by gender in two epidemic waves.

Figure 8. Relationship with a partner by gender in two epidemic waves.

the same, with a marked difference in favour of men: 74% of men said well-being had remained the same in April, while only 64% of women said well-being had remained the same. Here, the Chi-2 test was statistically significant (with a value of 21.37). In addition, 27% of women (compared to 16% of men) said that well-being had worsened, but there was a clear gender difference in the assessment that overall well-being had improved: overall, 16% of women (compared to 10% of men) said this.

Mental health was assessed quite differently (Figure 9): Although the majority of respondents said it had remained the same (74% of men and 58% of women), altogether 27% of women said it had worsened in April (compared with 16% of men). Mental health also had the highest Chi-2 test value in April (37.64). More revealing, however, is the figure for the October measurement for both genders: 26% of men said it had worsened, while 33% of women said it had; with a Chi-2 value of 13.79.

Physical health also remained at the same level as before the epidemic for the majority of respondents, again with significantly fewer women (67%) than men (74%) answering this question; the difference between genders was statistically significant with a Chi-2 value of 14.23. In October, however, physical well-being declined more sharply again among men, with only 69% rating it as remaining the same, but showed no statistically significant differences; in October, the Chi-2 test value was only 4.64. Gender differences are thus evident in all three indicators of well-being, with male respondents rating their general well-being and physical and mental health in autumn worse than male respondents in the spring wave.

4.3. Correlations of Social Factors With Childcare Burdens

Although the focus of this article has been primarily on gender differences within families in coping with the epi-

demic everyday reality, the data collected at both time points nonetheless offer other possible tests and considerations, particularly concerning other potential factors that may have determined families' coping with the epidemic, especially since any analysis of gender inequalities within the family should also take into account other structural factors that inevitably create (experiences of) social inequalities (Thorne & Yalom, 1992).

The results of correlation analysis using the Spearman rho-test, which is a suitable measure for testing potential relationships between the ordinal variables show that the pressure of childcare is strongly associated with other socio-demographic variables such as age, employment status, education, marital status, and household size (see Table 1). The correlation analysis of the April 2020 database of households with children showed that households with more members and employed respondents with higher education living with a partner seemed to be more burdened with childcare than the others. However, the most significant but negative correlation is shown concerning age: younger respondents were—expectedly—also less burdened with childcare than the older ones.

However, in the first wave of the epidemic, gender was not so much a key differentiator of the burdens with children within the families, but other sociodemographic indicators had a greater impact. For this reason, we repeated the same analysis on the sample of families in the fall survey (October 2020) to check whether the strength of each sociodemographic factor persisted, declined, or remained the same. Thus, we were interested in which sociodemographic variables had the greatest relation with childcare in the fall epidemic wave (see Table 1).

Namely, compared with April, some sociodemographic factors were no longer statistically significant in the fall: This was true for marital status and again for gender. Employment, on the other hand, showed a stronger correlation than in the spring, while the household size
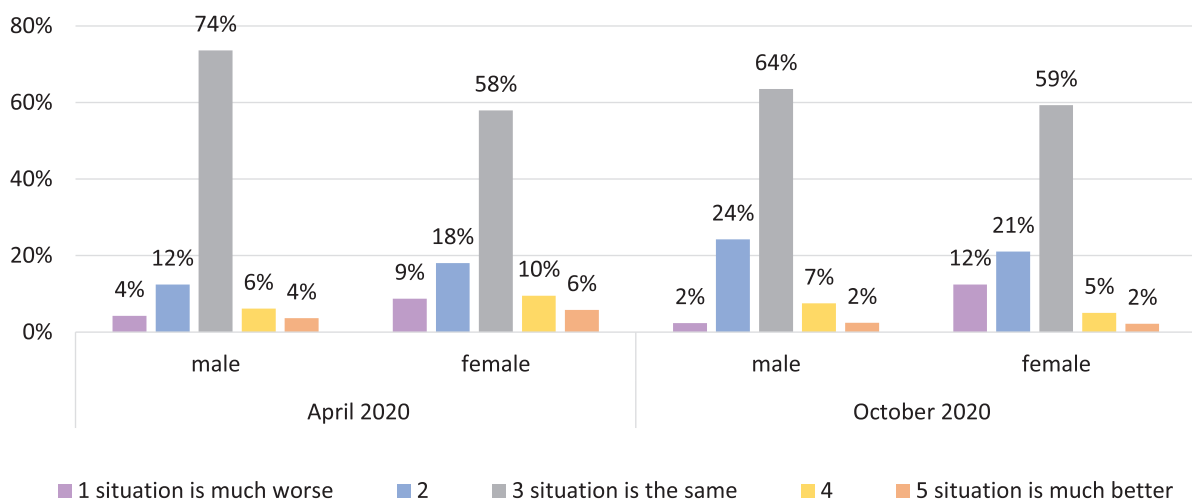

Figure 9. Personal well-being and mental health by gender in two epidemic waves.

Table 1. Spearman correlation coefficient between socio-demographic variables and childcare in April and October 2020.

		Education (recoded)	Single or living with a partner	Employed (no/yes)	Gender (recoded)	Household size	Age group	Childcare
April 2020								
Childcare	Correlation Coefficient	.251**	.140**	.408**	.054	.451**	−.502**	1,000
	Sig. (2-tailed)	,000	,000	,000	,058	,000	,000	
	N	1246	1233	1220	1249	1249	1249	1249
October 2020								
Childcare	Correlation Coefficient	.208**	.108	.412**	.056	.370**	−.507**	1,000
	Sig. (2-tailed)	,000	,051	,000	,314	,000	,000	
	N	326	324	321	326	326	326	326

and education of the respondent had a slightly lesser influence. Of all the chosen variables, only age remained an important predictor of a greater engagement with children in the fall (again with a negative coefficient value). Thus, the fall wave resulted in a significantly higher level of childcare for families with employed and better-educated parents in larger households.

One possible explanation for the at least slight decline in the influence of other factors would be that by the fall, the "normalisation" of epidemic daily life had already taken place: distance schooling had become the new reality, as had remote work, and the permanent period of lockdown, together with the curfew, meant a necessary turn toward a domesticised culture for all families. As a result, the factors that increased the burden of childcare in the spring remained mainly similar in autumn, but with some specific changes: socio-economic demographic variables, particularly employment and age, came to the fore as a greater burden: working from home and distance schooling have become constants, and families have found it more difficult to adapt.

5. Discussion and Conclusions

The epidemic lockdown and the consequent forced nuclearisation profoundly transformed everyday life and roughly divided family practices into two groups. While certain activities have largely decreased or even disappeared due to the lockdown and limited mobility, others, especially those related to home and basic needs, have intensified. Changes were more intense in the first lockdown because they happened much faster compared to the second lockdown, which was to be expected and certain behaviour patterns had already been consolidated based on the experiences of the first lockdown.

Forced nuclearisation caused the redistribution of activities, which took place to some extent along the existing gender inequalities. In the context of family labour, where we measured changes in housework, home and garden management, childcare, and care for elderly and relatives, three main characteristics emerged: the gender asymmetric division of labour; the increased burden of additional tasks on women; and the relatively similar patterns when comparing the two lockdowns. Our study confirmed that women were more burdened in particular with housework and childcare, and although this was not so much the case in the second lockdown, this does not mean that women were less under the pressure of these responsibilities as the second lockdown was extremely long. It seems that families maintained pre-epidemic patterns of a gendered division of family labour, and the epidemic only increased the pre-existing burden of women. However, the longest closure of the educational system forced families, especially women with children, to dramatically adapt to new everyday realities.

Nevertheless, data on changes in relationships within families and personal well-being in both epidemic waves do not show such a coherent picture. We hypothesised that forced nuclearisation would, in general, bring more tension to family relationships as family life became physically confined to the home and constant contact within the family became inevitable. However, the data on family relationships show that the situation was quite stable in both periods with no major gender differences. Similar results were also revealed in a study on the everyday life of military families during the first lockdown in Slovenia (Vuga Beršnak et al., 2020), while a German study by Möhring et al. (2021) on the other hand showed a general decrease in family satisfaction, and a Swiss study revealed some vulnerable groups (among them are women due to the workload) expressed some decline of life satisfaction during the lockdown (Kuhn et al., 2021). Interestingly, a Polish survey, which examined positive aspects of the Covid-19 pandemic in the first lockdown, revealed that the perceived positive aspects were directed towards individual rather than general social well-being and were more defensive than progressive,

while at the same time socio-demographic differences were not so strong (Krajewski et al., 2021).

The Slovenian findings may imply the importance of family and family ties, and positive aspects of child-centredness in general (Rener et al., 2006), where spending quality time with family members, especially with children, is highly valued. It could be even said that during the epidemic, Slovenian families, at least to a certain extent, demonstrated characteristics of the so-called "shelter" family type, where "withdrawal into the family group is considered desirable whereas external contacts are considered frustrating and dangerous" (Kellerhals et al., 1992, p. 310). This was probably partly related to the unknown health risks due to the new virus, while it was very important to people that families were safe during the lockdown, without serious long-term consequences.

Also, the majority of family respondents felt that overall well-being had remained the same in both lockdowns, but with a marked difference in favour of men (which is in accordance with the German study by Möhring et al., 2021). While it worsened for more women than men, it has also improved for more women than men. Regarding mental health, the situation has worsened for much more women than men (although for the majority it remained on the same level as before the lockdown). The same can be said for physical health, which also remained at the same level as before the epidemic for the majority of respondents, but with clear gender differences. However, in the fall lockdown, physical well-being declined more sharply again among men.

Gender differences are thus evident in all three indicators of well-being, with a somewhat greater impairment for men in the fall in comparison with the spring wave. Nevertheless, the situation has worsened in general for more women than men. This is for sure an additional indicator that women were under greater pressure concerning responsibilities during both lockdowns and that this was especially problematic during the second lockdown, which was much longer. This could be due to a variety of reasons, including multiple stresses experienced by women during the epidemic, the reduction in social contacts, and, last but not least, worries and fears related to other consequences of the epidemic emergency (financial difficulties, loss of employment, etc.). Given that paid work has moved into the home for many, it should not be overlooked that even if the scope of responsibilities in the sphere of paid work has not changed much, significant pressures have arisen from the demands of synchronous responsibilities (e.g., paid work, full-time housework, childcare, and helping children with school obligations) and balancing work and family. As in the German study by Hipp and Bünning (2021), we can also confirm a "pessimistic view" by which lockdowns more likely worsened the situation for many women.

The present study, which was essentially exploratory due to the rapid emergence of an exceptional situation, revealed only basic patterns of reorganisation of everyday practices and relationships in families in Slovenia under the changed circumstances of the lockdowns due to the epidemic. Major structural factors have in some way deepened existing social inequalities and thus produced different experiences and coping strategies, with government interventions or assistance only able to mitigate the resulting hardships for certain, albeit already disadvantaged social groups.

At the same time, the present findings point to the need for further, more detailed (quantitative and qualitative) studies that would allow for a conceptually stronger argumentation of perceived differences within epidemic everyday life. This involves not only explaining the differences already identified but also a deeper understanding of the family strategies or responses of households facing forced nuclearisation and the relocation of functions usually carried out by public institutions (such as kindergartens and schools) to the privacy of the home.

To conclude, the pandemic (and consequent political decisions) undoubtedly permanently changed social relations and fundamentally affected the structural features of everyday life. Forced nuclearisation with the ban on free movement, the closure of public institutions, and the switch to remote work have profoundly affected private lives, which are socio-demographically segmented and heterogeneous. It is, therefore, worthwhile to focus further research more broadly and to perceive the longer-term consequences of politically intended regulations that have, at least in Slovenia, problematically triggered a set of conditions that reinforce, rather than necessarily eliminate social inequalities.

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Conflict of Interests

The authors declare no conflict of interest.

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