

Psychological wellbeing in later life: the longitudinal effects of marriage, widowhood and marital status change

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SUMMARY

Aim The study examined cross-sectionally and longitudinally psychological wellbeing in the context of marital status, gender, and age.

Method Measures were taken eight years apart for three groups: married at both interviews; widowed at both interviews; and married at first interview but widowed at third. Data were analysed using multiple regression models: dependent variables were morale and social engagement; independent variables were marital status, gender and age.

Results Cross-sectionally significant differences were found for marital status and age for both morale and social engagement. Both widowed and newly widowed participants reported lower morale and social engagement than their married counterparts. In the longitudinal model, when prior levels of morale were taken into account, only age and being newly widowed contributed significantly to the variance (R^2). The same pattern of results was found for social engagement. Gender was never significant.

Conclusion The results illustrate the value of modelling both cross-sectional and longitudinal data. The latter demonstrated that the size of the effect differed between those who had recently widowed and those who had been widowed for longer. The study shows that age needs to be taken into account when examining widowhood. Copyright © 2005 John Wiley & Sons, Ltd.

KEY WORDS — gender; marital status; later life; health; mental health; longitudinal

INTRODUCTION

The combined roles of gender and marital status have rarely been examined systematically or comprehensively with respect to wellbeing. However, it is generally believed that men suffer more than women following bereavement (for a review see Stroebe *et al.*, 2001). Research suggests that morale and social engagement are influenced by factors including: gender (Copeland *et al.*, 1987; Sabin, 1993); marital status (Fengler *et al.*, 1982; Altergott, 1985) and gender by marital status interactions (Cramer, 1993). These

relationships also change over time, subject to influences such as widowhood (Bennett, 1996, 1998) and age (Larson, 1978).

Research has often been less than systematic. Most studies have not controlled for age (Farnsworth *et al.*, 1989), or systematically examined older people (Cotton, 1999). Studies may have examined gender but not the effects of marital status (Verbrugge, 1989). Those studies which have accounted for marital status may have examined only one status (van den Hoonaard, 1997), compared married people with those living alone (Davis *et al.*, 1996), or they may have examined marital status but not gender (Lawton *et al.*, 1984) and finally many studies have not examined changes in marital status (Cramer, 1993). Although these studies are valuable it is not possible to answer the question of whether among older people marital status and gender influence morale and social engagement.

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This study's rationale has three sources. First, previously I examined the effects of marital status change on psychological wellbeing separately in women and men (Bennett and Morgan, 1992; Bennett, 1998). During the course of the Nottingham Longitudinal Study of Activity and Ageing (NLSAA) participants who had become widowed were compared with those who remained married or never-married. However, it was not possible to draw conclusions about gender. Nevertheless gender is an important issue in studies of widowhood, since it is thought that men fare worse (Stroebe *et al.*, 2001). Second, my studies did not compare the experiences of recent widowhood with those of longer widowhood, and the effects are likely to be different. Finally, I have been influenced by Fenwick and Barresi's (1981) methodology in their study of marital status change in relationship to physical health. They found differences in the impact of marital status between cross-sectional and longitudinal models, and it is appropriate to apply their methodology to psychological wellbeing. The current study addresses three questions. Does marital status influence psychological wellbeing? Is the relationship between marital status and psychological wellbeing influenced by prior levels of psychological wellbeing? Are these relationships influenced by either gender or age?

METHOD

Data were derived from the NLSAA, full details of which are presented elsewhere (Morgan, 1998). It is an eight-year survey of activity, health and wellbeing conducted within a representative sample of community dwelling people aged 65 and over. The baseline survey was conducted in 1985 (T1), during which time 1042 people, randomly sampled from general practitioners' lists, were interviewed in their own homes (a response rate of 80%). The sample was demographically representative of the British elderly population. Follow-up surveys were conducted at four-yearly intervals in 1989 (T2) and 1993 (T3), with re-interview rates of 88% ($n = 690$) and 78% ($n = 410$) respectively obtained among survivors.

Questionnaire assessment

Assessments of morale were provided by a modified version of the 13-item Life Satisfaction Index (Wood *et al.*, 1969).

Levels of social activity were assessed using the Brief Assessment of Social Engagement (BASE) scale developed by Morgan *et al.* (1987). This addi-

tive scale contained 20 dichotomously rated items covering both actual (e.g. voting, attending religious services, taking holidays) and virtual (e.g. writing letters, reading newspapers/magazines, TV access) engagement.

Analyses

In these analyses all those participants who had been married at T1 and widowed by T3 were selected: 22 men and 45 women (New Widowed). In addition, there were 13 men and 115 women who had been widowed both at T1 and T3 (Widowed). Finally, there were 88 men and 66 women who were married at both T1 and T3 (Married). T2 data is not used in these analyses since some New Widows were still married, whilst others were already widowed.

A series of multiple regression models were analysed for morale and social engagement. Morale is used for illustration. The dependent variable was morale at T3. The independent variables were age, gender, and marital status dummy variables. There were two dummy marital status variables: Widowed; and New Widowed. They represent the difference between, for example the widowed, and the omitted category, married. In the cross-sectional model data were entered in two blocks: i. age and gender; ii. marital status. There were three blocks in the longitudinal model: i. morale at T1; ii. age and gender; iii. marital status.

RESULTS

The means and standard deviations are presented in Table 1.

The results of the multiple regression models for morale are presented in Table 2. In cross-sectional Model 1, age, but not gender, is shown to significantly influence morale. Thus the older an individual is the more likely they are to have lower morale. The addition of marital status significantly increases the explained variance. Lowered morale is found in the New Widowed and the Widowed. This model explains 5% of the variance. In the longitudinal models, morale at T1 explains 21% of the variance. However, the explained variance significantly increases with the addition of age (though not gender). Finally, the model is further improved with the addition of the New Widowed, but not the Widowed. The final model accounts for 25% of the variance.

The results for social engagement are presented in Table 3. As with morale, age, but not gender, is shown

Table 1. Means and standard deviation for morale and social engagement by gender and marital status

Measure	Gender	Ms	N	T1		T2	
				Mean	SD	Mean	SD
Morale	Men	Still-Married	88	18.78	5.22	17.71	4.79
		Still-Widowed	13	14.0	4.4	14.5	5.11
		New-Widowed	22	18.64	4.48	16.1	5.14
	Women	Still-Married	66	19.06	5.47	18.21	5.18
		Still-Widowed	115	16.99	5.02	16.37	5.39
Social engagement	Men	New-Widowed	45	17.47	5.33	15.36	5.67
		Still-Married	87	14.25	2.28	13.25	2.76
		Still-Widowed	13	11.31	2.25	11.07	3.17
	Women	New-Widowed	21	13.71	2.49	12.41	2.72
		Still-Married	66	14.05	2.43	13.55	2.41
		Still-Widowed	114	12.12	2.68	11.04	3.17
		New-Widowed	45	13.69	2.37	11.64	3.36

Table 2. Cross-sectional and longitudinal regression equations for morale at T3 (standardised coefficients)

	Cross-sectional Model		Longitudinal Model		
	Block 1	Block 2	Block 1	Block 2	Block 3
Gender	-0.14**	-0.05		-0.13**	-0.11*
Age	-0.01	-0.1		0.01	0.02
Widowed		-0.15*			-0.04
New Widowed		-0.16**			0.12*
Morale T1			0.467**	0.46**	0.458**
Intercept	27.54	24.67	8.41	17.97	17.24
R ²	0.02	0.05	0.22	0.23	0.25
R ² Change	—	0.03**	—	0.02*	0.01*

* $p < 0.05$; ** $p < 0.01$.

Table 3. Cross-sectional and longitudinal regression equations for social engagement at T3 (standardised coefficients)

	Cross-sectional Model		Longitudinal Model		
	Block 1	Block 2	Block 1	Block 2	Block 3
Gender	-0.09	0.01		-0.03	0.00
Age	-0.36**	-0.30**		-0.25**	-0.23**
Widowed		-0.28**			-0.09
New Widowed		-0.14**			-0.13**
Social engagement T1			0.60**	0.54**	0.53**
Intercept	28.98	26.07	2.91	15.18	14.42
R ²	0.15	0.20	0.36	0.42	0.43
R ² Change		0.05**		0.06**	0.01**

* $p < 0.05$; ** $p < 0.01$.

to significantly influence social engagement, cross-sectionally. The older an individual is the less likely they are to be socially engaged. The addition of marital status significantly increases the explained variance. Social engagement is found to be lower in the

Widowed or New Widowed, together with age they explain 20% of the variance. In the longitudinal models, social engagement at T1 explains 36% of the variance. However, this significantly increases with the addition of age but not gender. Finally, significant

improvements are found with the addition of the New widowed, but not the Widowed. The final model accounts for 43% of the variance.

DISCUSSION

The results confirm that psychological wellbeing is influenced by marital status cross-sectionally and longitudinally. The results also confirm that these relationships are influenced by prior levels of psychological wellbeing. Finally, the results show that whilst age is an influential factor in these relationships, gender is not. The evidence suggests that widowhood in general, and recent widowhood in particular, reduces levels of morale and social engagement. However, prior levels of psychological wellbeing significantly reduce the influence of prior widowhood: only recent widowhood predicts psychological wellbeing. Increased age is associated with poorer psychological wellbeing.

Cross-sectionally widowhood in general is associated with lower levels of morale and social engagement than being married, confirming earlier findings (Umberson *et al.*, 1996; Stroebe *et al.*, 2001). However, when prior levels of psychological wellbeing are accounted for, the effect remains significant only for the New Widowed. These findings reflect those of Fenwick and Barresi (1981) who found the same effects for perceived physical health, but not for days ill in bed at home. They argued that there appeared to be short-term declines in perceived health and increased days ill in bed at home in the long-term. The results of the current study suggest that the effects of widowhood on psychological wellbeing are more short-term. However, it is also possible that amongst the widowed morale and social engagement have already declined at T1, and have levelled off, not declining more by T3, in comparison with married participants—for example, if the relationship between psychological wellbeing and time since widowhood is not linear. A different type of design would be needed to examine this in more detail.

Whilst the same pattern of effects was found for morale and social engagement, more of the variance could be explained for social engagement (43% vs 25%), and the contribution of New Widowed was also larger. This is interesting since it suggests that social engagement is affected to a greater degree than morale (although one cannot compare directly the size of the coefficients). Why should social engagement thus be affected? Firstly, the nature of activities which need to be undertaken change with widowhood. More attention may be given to tasks of daily living and

domestic responsibilities. Social activities may cease with the loss of a partner. Holidays and letter writing may cease. In essence much social activity is dependent on companionship, and when the companion dies, it may take time for new companions to be found.

Age is shown to influence social engagement and morale, both decline with age. These results provide support for the findings of Havighurst *et al.* (1968). It also demonstrates that it is important to include age as a variable in any analysis of widowhood, since its impact is significant and impacts on other factors under investigation.

It had been expected that there would be an impact of gender on psychological wellbeing. This was not the case for either morale or social engagement. This is in contrast to Stroebe *et al.*'s (2001) review. In considering only those studies which they felt to be well designed, widowers fared less well. However, when one reads the studies in the review, they were not specifically concerned with older people and did not account for age (e.g. Cramer, 1993; Umberson *et al.*, 1996). It is possible that the gender effects are in some way inter-related to age. This points to the need to include age as a variable in any such analyses. It is possible that the relatively small number of men in these analyses may have masked some gender effects. It would be valuable to replicate this study with a larger sample size.

To conclude, the results show that being recently widowed significantly reduces morale and social engagement in both cross-sectional and longitudinal analyses. In cross-sectional analyses, long-standing widowhood also reduces morale and social engagement. The study demonstrates the advantages of comparing two groups of widows, those who become widowed during the course of the study, and those already widowed. It was not possible to draw comparisons with divorced, newly divorced and single

KEY POINTS

- Widowhood is associated with declines in social engagement and morale.
- The psychological wellbeing of long-standing and recent widowhood differs when prior levels of psychological wellbeing are controlled for, highlighting the differences between cross-sectional and longitudinal models.
- Age but not gender contributes to psychological wellbeing.

people, since unfortunately, the numbers of these people were too small. Age, but not gender, significantly impacts on psychological wellbeing. The evidence also shows the differences between cross-sectional and longitudinal analyses and how they contribute different perspectives to an understanding of marital status and psychological wellbeing.

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