Gendered experiences of widowhood and depression across Europe: The role of loneliness and financial resources

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Mental health is an integral part of health; indeed, there is no health without mental health» (WHO 2016).

- High prevalence of depressive symptoms in Western countries

- Increase of depressive symptoms in light of population ageing?
  - Mixed evidence regarding age-related changes in depression prevalence (Prince et al. 1999; Castro-Costa et al. 2007; Buber & Engelhardt 2011)

- Age-related risk factors for depression: Physical health declines, loss of independence, death of close persons...
Widowhood and mental health

- Partnership protective for physical and mental health (Brown & Wright 2017)

- Widowhood as a risk factor for mental health
  - More depressive symptoms and even manifest depression up to several years following partner loss (Brown & Wright 2017; Stroebe et al. 2007)

- Mechanisms?
  - Loss of one of the most important persons
  - Profound changes in daily life
    (1) Changes in social network & loneliness → especially for men?
    (2) Decreases in financial resources → especially for women?
Gendered patterns of adjustment

- 18 percent of the population aged 50+ were widowed, around 80 percent of widowed individuals were women (own calculations based on SHARE 2015)
- Do older women adopt more easily to widowhood relative to men?
- „psychosocial adjustment to widowhood is believed to reflect long-standing patterns of gender socialization and gendered practices of the life course“ (Perrig-Chiello et al. 2016).
Gendered patterns of adjustment

- 18 percent of the population aged 50+ were widowed, around 80 percent of widowed individuals were women (own calculations based on SHARE 2015)

- Do older women adopt more easily to widowhood relative to men?

- „psychosocial adjustment to widowhood is believed to reflect long-standing patterns of gender socialization and gendered practices of the life course“ (Perrig-Chiello et al. 2016).

- Empirical research provides no clear answer
  - More depressive symptoms in men (Förster et al. 2019)
  - More depressive symptoms in women (Lee & DeMaris 2007)
  - No gender differences (Schaan 2013)

- Different study samples and statistical modeling (often cross-sectional) (Carr & Brodnan-Deren 2009, Sasson & Umberson 2014)
Widowhood is not only an individual stressor, but also a social event.

Consequences are likely to vary depending on the macro-social context, as has been shown by cohort studies (Perrig-Chiello et al. 2016).

National differences (Schaan 2013)
- Strong family ties and the associated emotional and social support in Southern Europe as protective factor for widowed individuals?
- Higher burden for women in countries with traditional gender roles where partner’s pension are the main source of income?

Mental health consequences both gendered and context-specific.
Questions

(1) Are there gender differences in the effect of widowhood on depressive symptoms?

(2) To what extent do loneliness and decreased financial resources mediate the effect of widowhood on depressive symptoms?

(3) Are there regional differences in the effect of widowhood on depressive symptoms?
Data and methods

- **Longitudinal analysis**
  - Fixed-Effects Models (FEM)
  - Individual changes over time

- **Survey of Health, Ageing and Retirement in Europe**
  - Representative survey of the population 50+
  - Waves 5 (2013), 6 (2015) and 7 (2017/18)
  - 69,400 observations from 31,529 respondents
  - 797 persons became widowed (591 women, 206 men)
Dependent variable: Depressive symptoms

- EURO-D Scale: 12 items on depressive symptoms

1. Depressed mood
2. Pessimism
3. Wishing death
4. Guilt
5. Sleeping disorders
6. Loss of interest
7. Irritability
8. Loss of appetite
9. Fatigue
10. Concentration problems
11. Lack of enjoyment
12. Tearfulness

4+ symptoms: High probability of depression (Prince et al. 1999)
Dependent variable: Depressive symptoms

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4+ symptoms: High probability of depression (Prince et al. 1999)

- Criterion validity and psychometric properties have been confirmed, also for international comparisons (Prince et al. 2004; Castro-Costa et al. 2007; Ploubidis & Grundy 2009)
Measurement: Explanatory variables

- Widowhood as the main variable of interest
  - Analysis of gender differences by the inclusion of interaction terms
    \[ y_{it} = \beta_0 + \beta_1 x_{1it} \cdot \text{woman} + \beta_2 x_{2it} + \ldots + \beta_k x_{kit} + \mu_{it}, \mu_{it} = \alpha_i + \epsilon_{it} \]

- Mechanisms

  1. Financial problems
     „Thinking of your household’s total monthly income, would you say that your household is able to make ends meet..?“
     0 = easy / fairly easy, 1 = with some / great difficulty

  2. Loneliness
     „How much of the time do you feel lonely?“ 0 = rarely / never, 1 = sometimes / often

- Control variables: chronic diseases, age, wave of SHARE

Schmitz | Gendered experiences of widowhood and depression
Descriptive results

- Increase of depressive symptoms, women exceed threshold of 4 symptoms
- Little changes in financial situation in both genders
- Sharp increase of loneliness in both genders

<table>
<thead>
<tr>
<th></th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Married at baseline</td>
<td>Widowed at follow-up</td>
</tr>
<tr>
<td>Depressive symptoms</td>
<td>3.4</td>
<td>4.3</td>
</tr>
<tr>
<td>Some / great financial problems</td>
<td>42.6</td>
<td>43.0</td>
</tr>
<tr>
<td>Loneliness some or most of the time</td>
<td>25.6</td>
<td>64.6</td>
</tr>
</tbody>
</table>

Source: SHARE, own calculations.
Depressive symptoms following widowhood

- No gender differences in every of the European regions

→ Widowhood as a risk factor for mental health for both women and men!

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Northern Europe</th>
<th>Eastern Europe</th>
<th>Southern Europe</th>
<th>Western Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>β</td>
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</tr>
<tr>
<td>Widowed</td>
<td>0.816**</td>
<td>0.521*</td>
<td>0.586*</td>
<td>1.344*</td>
<td>0.704*</td>
</tr>
<tr>
<td></td>
<td>(0.161)</td>
<td>(0.241)</td>
<td>(0.336)</td>
<td>(0.456)</td>
<td>(0.219)</td>
</tr>
<tr>
<td>Widowed x Woman</td>
<td>0.047</td>
<td>0.008</td>
<td>0.093</td>
<td>-0.105</td>
<td>0.086</td>
</tr>
<tr>
<td></td>
<td>(0.196)</td>
<td>(0.364)</td>
<td>(0.407)</td>
<td>(0.511)</td>
<td>(0.282)</td>
</tr>
<tr>
<td>R² (within)</td>
<td>0.016</td>
<td>0.013</td>
<td>0.012</td>
<td>0.032</td>
<td>0.011</td>
</tr>
<tr>
<td>Observations</td>
<td>69,400</td>
<td>10,908</td>
<td>15,078</td>
<td>16,724</td>
<td>26,690</td>
</tr>
</tbody>
</table>

Source: SHARE, own calculations.
The role of financial problems and loneliness

- Increases in financial problems do not affect main effect of widowhood

→ Individuals who experience reduced financial resources are not more depressed than those who do not report changes in financial situation!

<table>
<thead>
<tr>
<th></th>
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<th>Model 2</th>
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<th>Model 4</th>
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<td>$\beta$</td>
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<tr>
<td>Widowed</td>
<td>0.850**</td>
<td>0.752**</td>
<td>0.242†</td>
<td>0.177</td>
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<td>(0.093)</td>
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<td>Increase of financial problems</td>
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<td>(0.027)</td>
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<tr>
<td>Widowed x Increase of financial problems</td>
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<td>0.203</td>
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<td></td>
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<td>(0.187)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase of loneliness</td>
<td>0.761**</td>
<td>0.757**</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>(0.032)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Widowed x Increase of loneliness</td>
<td>0.484*</td>
<td>0.466*</td>
<td></td>
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<tr>
<td></td>
<td>(-0.167)</td>
<td>(0.168)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$R^2$ (within)</td>
<td>0.016</td>
<td>0.018</td>
<td>0.040</td>
<td>0.042</td>
</tr>
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The role of financial problems and loneliness

- Increases in loneliness reduce the main effect of widowhood

→ Individuals who experience increases in loneliness are more depressed relative to their counterparts who are not affected by loneliness!

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Regional differences in depressive symptoms

- Widowed individuals are more depressed in Southern Europe as compared to the other regions

→ Regional differences diminished when controlling for financial resources and loneliness

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<td>( \beta )</td>
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</tr>
<tr>
<td>Widowed</td>
<td>0.608*</td>
<td>0.111</td>
</tr>
<tr>
<td></td>
<td>(0.199)</td>
<td>(0.208)</td>
</tr>
<tr>
<td>Northern Europe (Reference)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Widowed x Eastern Europe</td>
<td>-0.005</td>
<td>-0.225</td>
</tr>
<tr>
<td></td>
<td>(0.279)</td>
<td>(0.287)</td>
</tr>
<tr>
<td>Widowed x Southern Europe</td>
<td>0.645*</td>
<td>0.412</td>
</tr>
<tr>
<td></td>
<td>(0.288)</td>
<td>(0.297)</td>
</tr>
<tr>
<td>Widowed x Western Europe</td>
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<td></td>
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</tr>
<tr>
<td>Adjusted for loneliness and financial problems</td>
<td>no</td>
<td>yes</td>
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Summary and conclusions

- **Gender differences?**
  - Widowhood increases depressive symptoms irrespective of gender.
  - Due to high depression scores even before widowhood, a larger proportion of women reach the threshold for manifest depression.

- **Underlying mechanisms of depressive symptoms?**
  - Loneliness explains a substantial part of the increase in depression.
  - Financial problems, on the other hand, are not relevant.
  - Older people whose social life is strongly focused on their partner could be particularly vulnerable.
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  - Financial problems, on the other hand, are not relevant.
  - Older people whose social life is strongly focused on their partner could be particularly vulnerable.

- **Regional differences?**
  - Widowhood more burdensome in Southern Europe.
  - This can be traced back to a pronounced increase in loneliness.
Summary and conclusions

- **Limitations**
  - Comparison of two points of measurement (2 years)
  - Gender/ national differences in reporting behaviours, but existing studies based on SHARE suggest that inequalities in mental health are not attributable to differences in reporting styles (e.g., Kok et al. 2012)

- **Future studies needed!**
  - Gender-appropriate measurement of depressive symptoms?
  - Loneliness as a mechanism: Can social networks buffer the negative effect of widowhood on mental health?
  - Country-specific differences and macro-indicators?
Thank you for your attention!

Publication:

Research paper

Gendered experiences of widowhood and depression across Europe
The role of loneliness and financial resources from a longitudinal perspective

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References

References