

## Gender, Preloss Marital Dependence, and Older Adults' Adjustment to Widowhood

*I examine how preloss emotional and instrumental dependence on one's spouse affects older adults' psychological adjustment to widowhood. Analyses are based on 297 persons from the Changing Lives of Older Couples (CLOC) study, a prospective study of widowhood among adults aged 65 and older. Women who were most emotionally dependent on their spouses had the poorest self-esteem while still married, yet evidence the highest levels of self-esteem following loss. Men who were most dependent on their wives for home maintenance and financial management tasks experience the greatest personal growth following loss. These results suggest that widowed persons who were once highly dependent upon their spouses reap psychological rewards from the recognition that they are capable of managing on their own.*

Widowhood is one of the most distressing of all life transitions (Holmes & Rahe, 1967). Because families today are expected to be socially and economically autonomous, spouses may be highly dependent on each other, and may have few alternative sources of emotional and instrumental support (Utz, Reidy, Carr, Nesse, & Wortman, in press; Volkart & Michael, 1957). Newly bereaved spouses must adjust to the loss of an enduring emotional relationship, and also must manage the daily decisions and

responsibilities that were once shared by the couple (Umberson, Wortman, & Kessler, 1992; Utz et al., in press). Spouses who maintained a rigid gender-typed division of labor in the household may require the most profound behavioral and psychological readjustments upon loss. Some widowed persons who relied heavily on their late spouses may be ill prepared for their new responsibilities, and may become distressed or may seek a spousal substitute to fill the void left by the death. Others, however, may experience improved self-esteem and confidence as they master new skills and manage life on their own.

This study examines whether preloss marital dependence affects two aspects of positive adjustment to late-life loss: self-esteem and perceived personal growth. Using data from the Changing Lives of Older Couples (CLOC) study, I address three questions: (a) Is the effect of widowhood on self-esteem contingent upon dependence on one's spouse for instrumental and emotional support? (b) How does preloss marital dependence affect personal growth among the recently bereaved? (c) Do the effects observed in (a) and (b) vary by gender? This research builds on past bereavement scholarship by focusing on positive aspects of adjustment to loss, and by moving beyond a "who suffers worse?" approach, which typically investigates whether men or women cope better with loss. Rather, I recognize that large within-gender differences in marital dependence exist, and I seek to identify those aspects of marital roles and relationships that benefit men and women as they adjust to widowhood.

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Department of Sociology and Institute for Health, Health Care Policy & Aging Research, Rutgers University, 30 College Avenue, New Brunswick, NJ 08901 (carrds@rci.rutgers.edu).

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## THEORETICAL ISSUES

*Gender Differences in Reactions to Spousal Loss*

Gender differences in adjustment to late-life widowhood have been researched extensively, yet results remain inconclusive. Several studies report that widowed women are more distressed than men (e.g., Farnsworth, Pett, & Lund, 1989; Schuster & Butler, 1989; Thompson, Gallagher, Cover, Galewski, & Peterson, 1989), whereas many others find widowhood to have a more adverse effect on men than women (e.g., Lee, Willets, & Seccombe, 1998; Lee, DeMaris, Bavin, & Sullivan, 2001; Umberson et al., 1992). A third group finds no gender differences in the psychological consequences of widowhood (e.g., Gerstel, Riesman, & Rosenfeld, 1985; Lund, Caserta, Dimond, & Shapper, 1989; Zisook & Shuchter, 1991).

One explanation for this inconsistency is that until very recently, few studies have directly measured or controlled the specific mechanisms that may account for gender differences in vulnerability to loss, or resilience. Rather, many studies have adopted the “who suffers worse?” approach. This approach typically compares psychological distress levels among widows and widowers, and then attributes this difference posthoc to taken-for-granted assumptions about the distinctive ways that men and women experience marriage (see Hatch, 2000 for detailed review). These taken-for-granted assumptions typically reflect functionalist notions about family roles, where women are responsible for their children’s and spouse’s emotional and physical well-being, men are responsible for their family’s economic well-being, and men have few sources of emotional support other than their spouses (Parsons, 1955). Feminist writings, exemplified by Bernard’s (1972) *Future of Marriage*, argue that this traditional gender-based allocation of instrumental and emotional roles in marriage benefits men more than women. Although *his* marriage brings men health, power, and life satisfaction, *her* marriage subjects women to stress, dissatisfaction, and the loss of self (Gove, 1972). Ironically, both functionalist and early feminist perspectives on families would offer a generally similar explanation for gender differences in adjustment to spousal loss: Men and women tend to hold different roles and maintain different levels of dependence (versus self-sufficiency) in traditional marriages.

Functionalist assumptions about men’s and women’s marital roles have fallen out of favor among most family and gender scholars (Ferree, Lorber, & Hess, 1999; Osmond & Thorne, 1993), and recent research calls into question Bernard’s (1972) claim that marriage is deleterious to women’s well-being (Simon, 2002; Waite & Gallagher, 2000). These assumptions remain a powerful yet subtle influence on bereavement research, however. Studies that seek to identify the factors accounting for gender differences in reactions to spousal loss typically focus on aspects of family roles along which men and women have differed traditionally.

The primary mechanism linking widowhood to psychological distress among women is financial strain (Morgan, 1986; Umberson et al., 1992); this strain tends to reflect women’s dependence on their husbands for financial stability during marriage. In contrast, the primary mechanisms linking widowhood to psychological distress among men include their difficulty managing homemaking tasks (Lee et al., 2001; Umberson et al.), lack of close confiding relationships with persons other than their spouses (e.g., Antonucci, 1990; Peters & Liefbroer, 1997), and reliance on their spouses for health-maintenance behaviors and practices (Umberson et al.; Zisook, Shuchter, & Mulvihill, 1990). The psychological consequences of spousal loss for men, then, tend to reflect their dependence on their late wives for emotional support and some aspects of instrumental support, such as homemaking tasks (Carr et al., 2000).

Although recent studies have made important contributions in identifying some aspects of men’s and women’s lives that make them susceptible to widowhood-related distress (e.g., Umberson et al., 1992), few studies explicitly acknowledge that there is considerable *within-gender* variation in terms of most pathway variables, most notably marital roles and interdependence. Thus, I examine both overall gender differences in adjustment to loss and the extent to which these gender differences are moderated by marital dependence. The latter analyses address the important question: Do gender differences in adaptation to loss persist, even when we compare men and women who share similar levels of preloss emotional and instrumental dependence on their spouses?

Identifying the interactive or combined effects of gender and marital dependence on bereaved persons’ adaptation to loss may have important

implications for understanding both current and future cohorts of older widowed persons. Family roles that are rigidly defined by gender—where women are primarily responsible for expressive and nurturing responsibilities, and men are primarily responsible for the economic well-being of their wives and children—are increasingly blurred *over the life course* and *over historical time*. First, boundaries demarcating traditional “men’s roles” and “women’s roles” in marriage may become blurred as husbands and wives age. Although older married couples abide by a gender-typed division of household labor, just as younger couples do, this division may change as older adults face health declines and limitations to daily functioning (Szinovacz, 2000; Szinovacz & Harpster, 1994; Utz et al., in press). The onset of physical health problems may render older adults less able to perform the specialized homemaking or home maintenance tasks they performed earlier in the life course. Moreover, after couples reach retirement age, they no longer maintain a routine whereby the husband works for pay outside the home and the woman maintains responsibility for the household (Atchley, 1992). At ages 65 and older, the couple is less directly dependent on the husband’s current income; public entitlement programs such as Social Security provide an economic base for couples (Quadagno, 1996). For example, roughly 40% of older adults’ annual income comes from Social Security benefits (Social Security Administration, 1995).

Gendered patterns of emotional and instrumental dependence within marriage are slowly shifting over historical time. Current cohorts of older adults, such as persons in the CLOC sample, tended to hold traditionally defined gendered roles in both the home and workplace, with women placing priority on family and caregiving roles, and men directing their energies toward fulfillment of the breadwinner role (Bernard, 1972, 1981). Consequently, women tended to do more work around the house than their husbands did, and were also much more likely to manage daily homemaking tasks such as meal preparation and cleaning (Shelton & John, 1996). In contrast, recent cohorts of young women have attained educational parity with men and have maintained more continuous and well-paying work careers than in earlier decades. Consequently, the division of household labor and patterns of marital dependence have become slightly less differentiated by gender, although women still continue

to do more household tasks and management of family labor than do men (Carr, 2002; Mederer, 1993; Shelton & John). Gergen (1991) has characterized current cohorts of young adult men and women as “redefining cultural roles about being spouses” (p. 5). If current and future cohorts of young adults maintain a more fluid division of labor in the household than did past cohorts, these evolving spousal roles may set the stage for very different experiences of late-life bereavement in the future. In sum, it is important for researchers to move away from examining simple gender differences in the experiences of bereaved adults, and instead to consider whether such gender differences persist even when within-gender differences in marital dependence are considered.

I examine whether three aspects of marital dependence moderate the effect of gender on adjustment to spousal loss: dependence for homemaking tasks, dependence for financial and home maintenance tasks, and dependence for emotional support. Each of these aspects of marital dependence is evaluated *prior* to loss, because retrospective or postloss assessments of marital relationships are subject to both positive (Futterman, Gallagher, Thompson, Lovett, & Gilweski, 1990) and negative (Hirschfield et al., 1989) recall bias. For example, those who yearn most for their deceased spouses tend to *sanctify* or offer overly positive characterizations of their late spouses and marriages (Lopata, 1973), whereas bereaved persons who are highly distressed may offer the most negative retrospective evaluations of their marriages (Bonanno, Notarius, Gunzerath, Keltner, & Horowitz, 1998).

### *Personal Growth in the Face of Loss*

Most bereavement research focuses on psychological distress and the social and economic strains associated with spousal loss (see Stroebe, Hansson, Stroebe, & Schut, 2001 for review). On one hand, this limited scope is defensible. Distress and depression are relatively common reactions to loss; most studies find that 15% to 30% of bereaved older spouses experience clinically significant depression in the year following a spouse’s death (Jacobs, Hansen, Berkman, Kasl, & Ostfeld, 1989; Stroebe, Hansson, & Stroebe, 1993; Zisook & Shuchter, 1991). Moreover, the loss of one’s spouse is considered a particularly devastating event in industrialized individualistic societies, where most adults have

only a small number of highly significant interpersonal ties (Lofland, 1985).

Depression in the face of loss is relatively short-lived, however, so it is important that researchers also focus on the factors that promote resilience and personal growth among the bereaved (Wortman & Silver, 1989). Frantz, Farrell, and Trolley (2001) observe that “grief leaves in its wake many positive outcomes” (p. 191), yet most conclusions about such positive outcomes are based on small, nonrepresentative or clinical samples of women only. Widowed women often report feelings of self-confidence, an enhanced ability to cope with stress, a renewed sense of self-reliance, a tendency to try new experiences, and an awareness of internal resources, talents, and strengths that were unknown to them prior to the loss (e.g., Lieberman, 1996; Lopata, 1973; Silverman, 1987). Some widows report that their new sense of independence and competence was unwanted initially, and forced upon them by the vacuum of their husbands’ deaths. As their initial grief subsides, however, newly acquired skills and competencies surface and spawn renewed self-esteem (e.g., Lopata; O’Byrant, 1991).

In exploring the factors that promote personal growth following spousal loss, most studies have focused largely on personal characteristics of the widow, including her religious and spiritual beliefs (Park & Folkman, 1997), physical health (Ferraro, 1989), and social support network (Attig, 1996) following the death. I know of no studies that explore whether personal resilience is conditional upon the nature of the late marriage, and the extent to which the spouses were dependent upon one another for emotional and instrumental support. Are persons who were highly dependent on their spouses for practical and emotional support better or worse equipped to manage their new challenges? Do similar patterns emerge for bereaved older men and women?

Past research suggests that dependence on one’s spouse will affect men and women differently as they grapple with the loss of a spouse. For example, wives are more likely than husbands to have alternative sources of emotional and social support, with many men relying solely on their wives as confidantes (Antonucci, 1990). Men who are most emotionally dependent on their wives may be least prepared to adjust psychologically to their loss. By identifying precisely what is lost when a marriage ends, we can obtain a richer understanding of how and why

psychosocial resilience occurs among some bereaved elders.

### *Other Influences on Marital Dependence and Adjustment to Loss*

This analysis also considers three other potential influences on psychosocial resilience among the bereaved. First, I control psychological well-being prior to widowhood to help distinguish one’s emotional state before the death and change in emotional well-being that occurs following the death (Jacobs, 1993; Zisook & Shuchter, 1991). Although most studies have considered depressive symptoms as the sole indicator of preloss psychological well-being, I also consider anxiety and self-esteem. Second, the extent to which a presumed stressor—such as spousal loss—affects readjustment is linked to other resources and vulnerabilities. Consequently, I control for pre-loss socioeconomic status (education, income, and home ownership) and demographic characteristics (age and race). Finally, I control both spouse’s and respondent’s physical health at Wave 1, because health affects both the need for and ability to provide instrumental assistance at Wave 1, as well as the survivor’s resilience at the Wave 2 follow-up (Booth & Johnson, 1994; Wickrama, Lorenz, & Conger, 1997).

## METHOD

### *Data*

The Changing Lives of Older Couples (CLOC) study is a prospective study of a two-stage area probability sample of 1,532 married individuals from the Detroit Standardized Metropolitan Statistical Area (SMSA). All respondents were English-speaking members of a married couple in which the husband was age 65 or older. All sample members were noninstitutionalized and capable of participating in a 2-hour interview. The data are weighted here to adjust for unequal probabilities of selection and differential response rates at the initial interview (Wave 1). Wave 1 face-to-face interviews were conducted from June 1987 through April 1988. The response rate for the Wave 1 interview was 68%, which is consistent with rates for other Detroit-area studies in that period (see Carr & Utz, 2002 for detail on the CLOC study).

The CLOC researchers monitored spousal loss by reading the daily obituaries in Detroit-area

newspapers and by using monthly death record tapes provided by the state of Michigan. Researchers also used the National Death Index (NDI) and direct ascertainment of death certificates to confirm deaths and obtain causes of death. Of the 319 persons who lost a spouse during the study, 86% ( $n = 276$ ) participated in at least one of the three follow-up interviews that were conducted 6, 18, and 48 months after the death. Controls from the Wave 1 sample of 1,532 were selected to match the widowed persons in age, race, and gender. Married matched controls were reinterviewed at the three follow-up interviews at roughly the same time as corresponding widowed persons.

I use two analytic samples in this study. The first includes widowed persons and matched controls; I use this sample to evaluate whether the effect of widowhood on late-life self-esteem varies based on levels of marital dependence. Self-esteem is selected as an outcome because it is a general indicator of one's self-beliefs and can be measured among both the bereaved and married controls in the CLOC. This sample includes the 297 persons (210 widowed persons and 87 matched controls) who were interviewed at the 6-month follow-up. Matched controls were not available for all bereaved subjects at the 6-month follow-up because funding for the control sample was eliminated and then reinstated later in the data collection process. The second analytic sample includes widows and widowers only, thus it allows an exploration of how preloss marital dependence affects perceived personal growth since the loss. The bereaved sample includes 210 persons (59 men and 151 women) interviewed at the 6-month follow-up.

The issue of selective attrition deserves a brief mention. If bereaved persons who failed to participate in the 6-month follow-up (Wave 2) interview are significantly different in terms of Wave 1 characteristics from those who did participate, then caution should be taken in generalizing my findings to the larger population of older widowed persons. I estimated logistic regression models to identify the correlates of nonparticipation in the Wave 2 interview. I also examined gender differences in the sources of attrition because widowhood increases the risk of mortality more for men than women (Kaprio, Koskenuvo, & Rita, 1987). Consequently, men who survive until the 6-month follow-up and participate in the interview may have better emotional and physical health than their female

counterparts. The following variables were evaluated as predictors of attrition: Wave 1 demographic and socioeconomic characteristics, marital dependence, friend social support, physical and mental health, and spouse's health. Only three variables were significant predictors of attrition, and these effects did not differ significantly by gender (i.e., gender interaction terms were not significant at the  $p \leq .05$  level). Age and anxiety increased the risk of nonparticipation, and home ownership decreased the risk of nonparticipation at Wave 2. Thus, caution should be taken in generalizing these findings to the population at large, because older, more anxious, and residentially mobile persons may be underrepresented in the analytic sample.

### Variables

*Dependent variables.* *Self-esteem* ( $\alpha = .69$ ) is a widely used construct that taps general feelings toward one's self (Rosenberg, 1979). The five-item scale is based on averaged responses to the questions: "Please tell me how true the following statements are. Would you say very true, somewhat true, a little true, not true at all: (a) On the whole, I am satisfied with myself; (b) At times I think I am no good at all (reverse-coded); (c) I wish I could have more respect for myself (reverse-coded); (d) All in all, I am inclined to feel that I am a failure (reverse-coded); and (e) I feel I am a person of worth, at least equal with others." Higher scores (on a scale from 1 to 4) reveal higher levels of self-esteem.

*Perceived personal growth* ( $\alpha = .51$ ) reflects beliefs that some aspects of one's life or oneself have improved since the death of one's spouse. Although the alpha is somewhat lower than is desirable, the scale has strong face validity, and the elimination of any single item reduces the alpha considerably. Scores are based on the averaged responses to four questions: "I have a list of things that bereaved people have said about themselves. Please tell me how true each statement is of you: very true, somewhat true, a little true, not true at all. (a) As a result of having to manage without my spouse, I have become more self-confident; (b) I have more freedom now than I did when he or she was still alive; (c) I am a stronger person as a result of dealing with the loss of my spouse; and (d) Thinking about all parts of your life, including the way you feel, to what extent would you say you are back to managing as well as ever? Would you say completely,

almost completely, fairly much, somewhat, or not much?" The items evaluating perceived growth are original items created for the CLOC data set. Higher scores (on a scale from 1 to 4) reflect greater personal growth. Both dependent variables are standardized, and thus have a mean of 0 and standard deviation of 1.

*Independent variables.* Widowhood is a dichotomous variable indicating persons who lost their spouses between the Wave 1 and 2 interviews. Control variables include *age*, *race* (1 = *Black*), *gender* (1 = *woman*), *home ownership at Wave 1* (1 = *owns home*), *education* (a continuous measure ranging from 3 to 17 or more years of completed schooling), and *total household income at Wave 1* (natural log of income). Total household income originally was measured by asking respondents which of 10 income categories best characterized their economic status. A continuous measure of income was derived by taking the midpoint of each of the 10 categories, with Pareto estimation of the mean for the top category. The natural log of income is used because the income distribution is skewed, with most respondents in the lower income groups.

Wave 1 (preloss) indicators of emotional and physical well-being are controlled in order to address the possibility that the relationship between widowhood and psychological adjustment is spurious. The preloss characteristics that elevate one's risk of widowhood, such as low socioeconomic status or poor health, also may be associated with poorer adjustment at the 6-month follow-up. *Self-esteem* ( $\alpha = .72$ ) at Wave 1 is measured exactly as described earlier (Rosenberg, 1979). *Depressive symptoms* ( $\alpha = .83$ ) are assessed with a subset of nine negative items from the 20-item Center for Epidemiologic Studies depression (CES-D) scale (Radloff, 1977). The CES-D is widely used to evaluate depressive symptoms in a community sample. Respondents are asked to indicate how often they experienced each of the following nine symptoms in the week prior to interview: (a) I felt depressed, (b) I felt that everything I did was an effort, (c) My sleep was restless, (d) I felt lonely, (e) People were unfriendly, (f) I did not feel like eating. My appetite was poor, (g) I felt sad, (h) I felt that people disliked me, and (i) I could not "get going." Response categories are: hardly ever, some of the time, or most of the time.

*Anxiety* ( $\alpha = .86$ ) is assessed with 10 items from the Symptom Checklist 90 Revised, a widely used scale to measure anxiety in community

samples (Derogatis & Cleary, 1977). Respondents are asked to indicate how often they have been bothered by each of the following symptoms in the week prior to interview: (a) nervousness or shakiness, (b) trembling, (c) feeling suddenly scared for no reason, (d) feeling fearful, (e) heart pounding or racing, (f) feeling tense and keyed up, (g) spells of terror and panic, (h) feeling so restless you couldn't sit still, (i) feeling that something bad is going to happen to you, and (j) thoughts and images of a frightening nature. Response categories are: not at all, a little bit, moderately, quite a bit, and extremely. Scores for depressive symptoms, anxiety, and self-esteem are standardized for ease of interpretation, and have a mean of 0 and standard deviation of 1.

Respondent's *physical health* is assessed with the question: "How would you rate your health at the present time? Would you say it is excellent, very good, good, fair, or poor?" *Spouse's physical health* is evaluated with a similar question: "How would you rate your spouse's health at the present time?" Both respondent's and spouse's health are recoded into dichotomous variables where responses of *fair or poor* are coded as 1, and those with *good or better health* are coded as 0.

All analyses control for the duration (in months) between the Wave 1 and Wave 2 interviews. Although all Wave 2 interviews were conducted 6 months after spousal death, the duration between the Wave 1 and Wave 2 interviews ranges from 9 to 76 months due to variation in the timing of spouses' deaths. Thus, Wave 1 assessments are more temporally distant for those who lost their spouses at later dates. In preliminary analyses, I evaluated whether the effects of the key independent variables—the marital dependence indicators—varied based on the time that has passed since they were measured; that is, I estimated interaction terms of marital dependence by duration in months between interviews. Both continuous and categorical indicators were considered. Categories included less than 24 months, 24 to 48 months, and more than 48 months. The interaction terms were not statistically significant, suggesting that the effects of marital dependence indicators do not vary based on when they were evaluated.

*Moderator variables.* The main objective of this analysis is to evaluate whether adjustment to spousal loss varies based on how dependent a widower or widow was on his or her now-deceased

spouse. Questions assessing marital dependence are drawn from a modified version of the Dyadic Adjustment Scale (Spanier, 1976). Respondents are asked to assess how frequent (almost always, often, sometimes, rarely, or never) or true (very, somewhat, a little, or not at all true) a given statement is. Exploratory and confirmatory factor analyses were conducted to create the subscales of emotional and instrumental dependence. Higher scores reflect higher levels of dependence. All scales are standardized and have a mean of 0 and standard deviation of 1.

I consider both instrumental and emotional aspects of marital dependence and social support from friends, which may render persons less dependent on their spouses. *Instrumental dependence* is measured with the questions: "Husbands and wives often depend on one another to handle different responsibilities. At the present time, how much do you depend on your spouse to (a) handle or help with home maintenance and minor repairs; (b) keep up with checking and savings accounts and pay bills; (c) make major financial and legal decisions; and (d) prepare meals, general housework, and laundry?" Factor analyses yielded one three-item subscale ( $\alpha = .54$ ) comprising items 1 through 3, and a single-item measure (item 4).

*Emotional dependence* ( $\alpha = .73$ ) is measured with the following three questions: "Suppose your spouse were away visiting relatives or friends for a couple of weeks. Thinking about this situation, please tell me how true each statement is as it applies to you: (a) I would not know what to do with myself if my spouse were away; (b) If I couldn't talk to my spouse every day, it would really bother me; and (c) I hate being home by myself."

*Friend social support* ( $\alpha = .71$ ) is measured with a two-item scale originally developed for use in the American Changing Lives study (House, 1989) and which is widely used in studies of social support (e.g., House, Landis, & Umberson, 1988). This scale assesses the emotional support received from persons *other than* one's spouse and children. The scale is based on the following two questions: "On the whole, how much do your friends and relatives make you feel loved and cared for?" and "How much are your friends and relatives willing to listen when you need to talk about your worries or problems?" These questions were asked separately regarding support from children and support from spouse, thus, respondents understood that "friends and

relatives" referred to persons other than spouse or children. Response categories for all dependence and social support items are: a great deal, quite a bit, some, a little, and not at all. Higher scores (on a scale of 1 to 5) reveal higher levels of support. Each of the dependence scales is standardized for ease of presentation and interpretation, and thus has a mean of 0 and standard deviation of 1.

## RESULTS

### *Sample Characteristics*

Descriptive statistics and *t* tests comparing means for the widowed and matched controls, by gender, are presented in Table 1. The bivariate analyses reveal that on average, men and women have different responsibilities in marriage. In both the married (control) sample (column 2) and the bereaved sample (column 3), men report higher levels of dependence on their spouses for homemaking tasks than do women, whereas women report greater reliance on their spouses for household maintenance and financial management tasks than do men.

Consistent with a large literature on gender differences in interpersonal relationships, men report significantly higher levels of emotional dependence on their spouses and lower levels of emotional support from friends than women do. Given that men receive more emotional support from their spouses than do women, it is not surprising that married men have higher self-esteem than both married women (.50 versus  $-.02$ ) and widowed men (.50 versus  $-.05$ ) at the 6-month follow-up. Among the bereaved, women report significantly higher levels of personal growth following loss than do men (1.3 versus  $-.32$ ).

The bereaved and their matched controls also differ in other important ways. Persons who were bereaved by Wave 2 were more likely to report at Wave 1 that their spouses were in poor health, they had less income, and they were less likely to own their own homes. Compared to the matched controls, the recently bereaved were much less dependent on their late spouses for performing both home repair and financial tasks ( $-.32$  versus  $.22$ ,  $p \leq .001$ ) and homemaking ( $-.53$  versus  $-.01$ ,  $p \leq .001$ ) tasks. The lower levels of dependence among the bereaved likely reflect the fact that their spouses were unhealthy and less capable of fulfilling their household responsibilities

TABLE 1. DESCRIPTIVE STATISTICS (SD) BY WIDOWHOOD STATUS AND GENDER, CHANGING LIVES OF OLDER COUPLES (CLOC) STUDY, 1987-1994

	Total Sample (N = 297)		Control Sample (n = 87)		Bereaved Sample (n = 210)	
	Widowed	Controls	Men	Women	Men	Women
<i>Dependent variables</i>						
Self-esteem, Wave 2	.10 (1.0)	.11 (.91)	.50 (.60)	-.02* (.96)	-.05 (1.3)	.17 (.87)
Perceived personal growth, Wave 2	.00 (.74)	—	—	—	-.32 (.84)	1.3* (.70)
<i>Dependence measures</i>						
Dependence on spouse for homemaking tasks	-.53 (1.1)	-.01*** (1.0)	.79 (.33)	-.27*** (1.0)	.01 <sub>a</sub> (1.3)	-.73*** (.88)
Dependence on spouse for	-.32 (.91)	.22*** (.70)	.01 (.79)	.29 (.66)	-.75 <sub>a</sub> (1.0)	-.15*** (.79)
Emotional dependence on spouse	-.11 (.94)	-.06 (.97)	.46 (.33)	-.23*** (1.0)	.08 <sub>a</sub> (.76)	-.19* (.99)
Emotional support from friends	.05 (1.0)	.13 (1.0)	-.30 (.86)	.27* (1.0)	-.36 (.98)	.20*** (.99)
<i>Wave 1 well-being</i>						
Depressive symptoms (CES-D)	.05 (.96)	-.02 (1.1)	-.31 (1.1)	.08 (1.1)	-.09 (.74)	.13 (1.1)
Anxiety	.01 (.76)	-.13 (.73)	-.25 (.53)	-.09 (.78)	-.19 (.54)	.08* (.82)
Self-esteem	-.09 (.99)	.24*** (.76)	.24 (.45)	.24 (.84)	-.15 <sub>a</sub> (.91)	-.07 <sub>a</sub> (1.0)
Respondent's physical health (1 = fair/poor)	.33 (.47)	.25 (.44)	.34 (.49)	.22 (.42)	.41 (.50)	.30 (.46)
Spouse physical health (1 = fair/poor)	.60 (.49)	.29*** (.46)	.34 (.49)	.27 (.45)	.53 (.50)	.63 <sub>a</sub> (.49)
<i>SES and demographic characteristics</i>						
Education	11.27 (2.92)	11.68 (2.79)	10.87 (3.31)	11.94 (2.57)	11.12 (3.44)	11.33 (2.69)
Income	21,048 (16,417)	23,303 (16,912)	25,814 (18,025)	22,486 (16,608)	22,511 (16,745)	20,480 (16,308)
Income (natural log)	1.32 (.52)	1.44* (.46)	1.51 (.43)	1.41 (.47)	1.37 (.52)	1.29 (.52)
Owns home (1 = owner)	.92 (.28)	.97 (.18)	.95 (.22)	.97 (.17)	.97 (.18)	.90 (.30)
Race (1 = Black)	.16 (.36)	.14 (.35)	.05 (.22)	.17 (.38)	.16 (.37)	.16 (.36)
Age	70.56 (6.94)	69.05 (6.08)	72.58 (5.54)	67.89*** (5.83)	73.46 (5.92)	69.43*** (6.99)
Months between Wave 1 and Wave 2 interviews	36.35 (18.41)	59.40** (8.31)	58.95 (8.31)	59.55 (8.36)	35.83 (19.21)	36.55 (18.15)
N	210	87	22	65	59	151

Note: *t* tests evaluated mean differences. Asterisks denote significant differences between bereaved and controls in the total sample (column 1), and gender differences in the control (column 2) and bereaved (column 3) subsamples. Subscript <sub>a</sub> denotes within-gender differences, by widowhood status, where difference is significant at *p* < .05 level.

\**p* < .05. \*\**p* < .01. \*\*\**p* < .001.

at Wave 1. The demands of living with a spouse who is near the end of life appear to take a toll on self-esteem: At Wave 1, the married controls report significantly higher levels of self-esteem than do persons who become widowed (.24 versus -.09, *p* ≤ .01).

*Gender Differences in the Effect of Widowhood on Self-Esteem*

The first objective of the multivariate analysis is to examine whether widowhood affects the self-esteem of men and women in different ways, and

to explore whether these differences reflect gendered patterns of how marriage is experienced. Column 1 in Table 2 displays an OLS regression model that estimates the main and interactive effects of gender and widowhood status on self-esteem for the total sample. Columns 2 and 3 display the results of gender-specific OLS regression models; these models reveal the pathways through which widowhood affects men's and women's self-esteem.

Model 1 for the total sample shows that widowed men have self-esteem scores that are one-half standard deviation lower than still-married men at the 6-month follow-up ( $b = -.51, p \leq .05$ ). In contrast, widowed women have self-esteem scores that are .20 standard deviations higher than their married counterparts (i.e.,  $.20 = -.51 + .70$ ). Although widowed women and men do not differ in terms of their self-esteem levels, married women have self-esteem scores that are .6 standard deviations lower than married men. The self-esteem levels of widowed and married men and women, net of all variables adjusted in Model 1, are plotted in Figure 1A.

The results plotted in Figure 1A raise an important question: Why is widowhood associated with enhanced self-esteem among women, but decrements in self-esteem among men? To answer this question, I first estimated the effect of widowhood on self-esteem for men and women separately (Table 2, Model 1 for gender-specific samples). Next, I evaluated whether the effect of widowhood was moderated by each of the following four indicators of dependence (assessed at Wave 1): dependence for homemaking tasks, dependence for home maintenance and financial management tasks, emotional dependence, and emotional support from friends. Of the eight possible two-way interaction terms (i.e., four dependence characteristics by widowhood status for men and women), only three were statistically significant. For women, the positive effect of widowhood on self-esteem is conditional upon emotional dependence in their marriages (Model 2, women-only models). For men, the negative effect of widowhood on self-esteem is conditional upon the ways that spouses depended on one another for instrumental support during the marriage (Model 2, men-only models).

Model 1 in the women-only analysis shows that widowed women have significantly higher self-esteem than their married peers ( $b = .28, p \leq .05$ ). The size of this self-esteem gap is con-

ditional upon preloss marital dependence, however; the self-esteem gap between married and widowed women increases as levels of emotional dependence increase. For married women, each standard deviation increase in emotional dependence is associated with a one-third standard deviation *decrease* in self-esteem. In contrast, each standard deviation increase in emotional dependence is associated with a very slight increase in widowed women's self-esteem ( $b = .05 = -.345 + .350$ ). Living in a marriage where one is highly emotionally dependent on one's husband appears to take a modest toll on women's self-esteem. Widowed women, however, may receive self-esteem benefits from recognizing that they have survived an event that had earlier seemed insurmountable. Importantly, the main effect of widowhood is only marginally significant in Model 2 ( $b = .25, p \leq .10$ ): At average levels of emotional dependence, widowed and married women do not differ significantly in terms of their self-esteem. In sum, the results show that emotional dependence on spouse is an important predictor of women's self-esteem, and its impact is significantly different for women based on whether they are widowed or still married. The relationship is plotted in Figure 1B.

The gender-specific analyses also show that widowhood has a significant negative effect on men's self-esteem ( $b = -.72, p \leq .05$ ). The moderator variable analyses, however, show that the self-esteem consequences of widowhood (and marriage) for men are contingent upon the organization of household labor during marriage. For married men, self-esteem is enhanced by adherence to a traditional gender-based division of labor. A married man's self-esteem increases as his dependence on his spouse for homemaking tasks increases ( $b = 2.67, p \leq .05$ ). In contrast, a widower's self-esteem is negatively affected by his dependence on his late wife for homemaking tasks, although this effect is quite small ( $b = -.25 = 2.67 - 2.92$ ). Widowed men who had been highly dependent on their wives for homemaking tasks such as meal preparation may evidence self-esteem decrements in the short term as they struggle to develop their skills in a domain that they may have previously left to their wives.

In contrast, as a married man's dependence on his wife for household maintenance and financial management tasks increases, his self-esteem decreases ( $b = -1.3, p \leq .05$ ). This relationship may reflect the self-esteem threat that accompanies an individual's deviation from widely held

TABLE 2. SUMMARY OF HIERARCHICAL REGRESSION ANALYSIS FOR VARIABLES PREDICTING SELF-ESTEEM AT WAVE 2 FOLLOW-UP, CHANGING LIVES OF OLDER COUPLES (CLOC) STUDY, 1987-1994

Variable	Total Sample						Women						Men					
	Model 1		Model 2		Model 1		Model 2		Model 1		Model 2		Model 1		Model 2			
	B	SE B	B	SE B	B	SE B	B	SE B	B	SE B	B	SE B	B	SE B	B	SE B		
Widow	-.51*	.24	.28*	.15	.25 <sup>†</sup>	.15	-.72*	.37	1.67	1.22								
Sex (1 = female)	-.60**	.22																
Sex * widow	.70**	.26																
<i>Wave 1 well-being</i>																		
Depressive symptoms (CES-D)	.14*	.06	.14*	.07	-.13*	.07	-.08	.18	-.16	.22								
Anxiety	.15 <sup>†</sup>	.08	.13 <sup>†</sup>	.08	.16*	.08	.47	.32	.61 <sup>†</sup>	.35								
Self-esteem	.35***	.06	.37***	.07	.37***	.07	.38*	.20	.38 <sup>†</sup>	.20								
Own health (1 = fair/poor)	-.23 <sup>†</sup>	.12	-.11	.13	-.09	.13	-.44	.29	-.39	.31								
Spouse health (1 = fair/poor)	.04	.11	.03	.12	-.02	.12	.01	.31	-.10	.32								
Own age (in years)	-.02 <sup>†</sup>	.01	-.01	.01	-.01	.01	-.02	.02	-.03	.03								
<i>Demographic characteristics</i>																		
Education (in years)	-.02	.02	.01	.02	.01	.02	-.07	.05	-.06	.05								
Income (natural log)	-.10	.11	-.05	.12	-.04	.12	-.23	.31	-.39	.36								
Owens home (1 = owner)	.09	.21	-.02	.21	-.05	.20	.89	.76	.79	.82								
Race (1 = Black)	.25 <sup>†</sup>	.15	.30*	.15	.33*	.15	-.01	.43	.03	.44								
<i>Dependence measures</i>																		
Emotional dependence on spouse					-.35**	.13												
Emotional dependence on spouse * widowhood					.34**	.15												
Dependence on spouse for homemaking tasks									2.67*	1.35								
Dependence on spouse for homemaking tasks * widowhood									-.2.92*	1.39								
Dependence on spouse for home maintenance and financial tasks									-.1.30*	.55								
Dependence on spouse for home maintenance/financial tasks * widowhood									1.58**	.59								
Months between Wave 1 and 2 interviews	.001	.002	.001	.002	.001	.002	.001	.002	.001	.002								
Intercept	2.13	.76	.46	.80	.54	.79	3.28	1.94	1.75	2.12								
R <sup>2</sup> adj	.19		.22		.24		.15		.19									
		N = 297		n = 217		n = 80												

<sup>†</sup>p < .10. \*p < .05. \*\*p < .01. \*\*\*p < .001.

FIGURE 1A. SELF-ESTEEM (WAVE 2) BY WIDOWHOOD STATUS AND GENDER

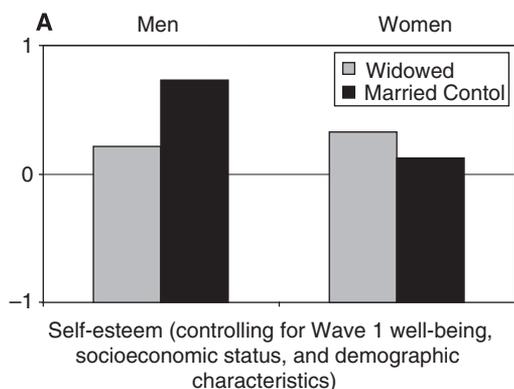
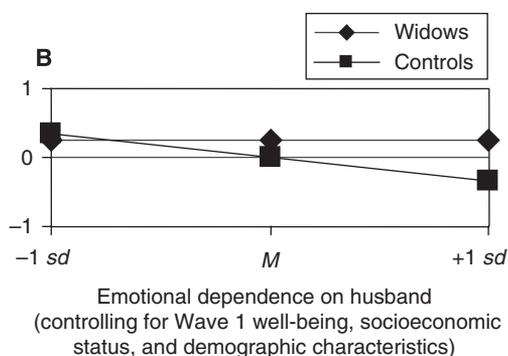


FIGURE 1B. SELF-ESTEEM (WAVE 2) BY WIDOWED AND MARRIED WOMEN, BY EMOTIONAL DEPENDENCE ON SPOUSE (WAVE 1)



social norms (Jackson, 1966). Men who rely on their wives for home maintenance and financial management tasks are violating traditional expectations of the husband role (e.g., Bernard, 1981). In contrast, widowed men who were dependent on their late wives for these tasks experience small self-esteem increases following their loss ( $b = .28 = -1.3 + 1.58$ ). Men may gain self-esteem from learning and managing new tasks that are associated with the traditionally defined male role.

#### *Personal Growth in the Face of Loss*

Table 3 presents OLS regression models for the sample of bereaved persons only. Model 1 estimates the effect of gender on perceived personal growth. Models 2 and 3 incorporate the two

statistically significant moderators of the gender effect: social support from friends and dependence on spouse for home repair and financial management tasks. (Neither emotional dependence nor dependence on one's spouse for home-making tasks is a significant moderator of the relationship between gender and personal growth.) Model 1 shows that widows have personal growth scores that are roughly one-third standard deviation higher than those of widowers, even after preloss psychological and economic resources are controlled.

Model 2 shows that for widowers only, personal growth is strongly and positively affected by the availability of emotional support from friends ( $b = .28, p \leq .05$ ). In contrast, social support from friends is negatively related to adjustment among widows, although this effect is very small ( $b = -.08 = .28 - .36, p \leq .05$ ). Figure 2A shows that women generally report higher personal growth scores than men do, yet this gender gap is conditional upon the availability of social support from friends. The gender gap in personal growth is most pronounced among persons with low levels of social support from friends, and the gap completely closes (and reverses slightly) among persons with the highest levels of emotional support from friends. Widowed men with few sources of emotional support other than their now-deceased spouse may be particularly overwhelmed by the death. Men who have high levels of social support, however, benefit from a resource that is widely believed to be an important source of women's resilience upon loss: emotional support from friends. Women, in contrast, are slightly negatively affected by social support; A strong support network may provide widows so much assistance that they do not have the opportunity to develop new skills and an accompanying sense of personal growth.

Model 3 shows that dependence on one's late spouse for home maintenance and financial management tasks is associated with enhanced personal growth among men ( $b = -.38; p \leq .05$ ), yet slight declines in personal growth scores among women ( $b = -.08 = .28 + -.36; p \leq .05$ ).

Widowed men may receive a self-confidence boost and a sense of purpose by taking on new tasks that are traditionally considered to be a husband's responsibility. Few other characteristics are significant predictors of postloss personal growth. Persons whose spouses were in poor health prior to loss report significantly higher personal growth following the death, likely due

TABLE 3. SUMMARY OF HIERARCHICAL REGRESSION ANALYSIS FOR VARIABLES PREDICTING PERSONAL GROWTH (WAVE 2) AMONG THE BEREAVED, CHANGING LIVES OF OLDER COUPLES (CLOC) STUDY, 1987–1994 (N = 210)

Variable	Model 1		Model 2		Model 3	
	B	SE B	B	SE B	B	SE B
Gender (1 = female)	.36*	.16	.27	.17	.09	.19
<i>Wave 1 well-being</i>						
Depressive symptoms (CES-D)	-.04	.08	-.04	.08	.01	.09
Anxiety	-.01	.11	-.01	.11	-.03	.11
Self-esteem	.01	.08	.02	.08	.03	.08
Own health (1 = fair/poor)	-.22	.16	-.24	.16	-.13	.16
Spouse health (1 = fair/poor)	.32*	.15	.35*	.15	.38*	.15
Own age (in years)	-.01	.01	-.02	.01	-.01	.01
<i>Demographic characteristics</i>						
Education (in years)	-.05 <sup>†</sup>	.03	-.05*	.03	-.03	.03
Income (natural log)	-.11	.15	.11	.15	-.04	.15
Owens home (1 = owner)	.08	.25	.14	.25	.03	.25
Race (1 = Black)	-.12	.20	-.16	.20	-.16	.20
<i>Dependence measures</i>						
Emotional support from friends			.28*	.13		
Emotional support from friends * gender			-.36*	.16		
Dependence on spouse for home maintenance and financial tasks					.38*	.14
Dependence on spouse for home maintenance and financial tasks * gender					-.35*	.17
Months between Wave 1 and 2 interviews	.001	.002	.001	.002	.001	.002
Intercept	1.33	.93	1.49	.95	1.22	.92
R <sup>2</sup> adj	.05		.07		.08	

<sup>†</sup>p < .10. \*p < .05. \*\*p < .01. \*\*\*p < .001.

to their freedom from the caregiving stressors associated with a spouse’s poor health.

DISCUSSION

The purpose of this study is to move beyond a “who suffers worse?” approach to understanding gender differences in late-life widowhood, and to instead highlight within-gender diversity in how the newly bereaved cope with loss. Taken together, the findings underscore that how one adjusts to the loss of a spouse is inextricably linked to the ways one experienced marriage. I briefly review the key findings and highlight the implications of these findings for understanding bereavement among current and future cohorts of older adults.

*Traditional Marriage Enhances Older Men’s Self-Esteem*

At first inspection, the analyses suggest that becoming widowed enhances women’s self-esteem and hurts men’s self-esteem. This conclusion would support the argument by Bernard (1972) and others that marriage is a more beneficial and self-esteem-enhancing institution for men than for women (see also Gove, 1972).

Upon closer analysis, however, it appears that at least for older cohorts, married men’s self-esteem is enhanced when they maintain a traditional gendered division of labor in the household—that is, when they are highly dependent on their wives for meal preparation, laundry, and housework. In contrast, married men who rely on their wives for home maintenance and financial management tasks have lower self-esteem than all other categories of men. These findings suggest that it is not necessarily gender or marital status per se that affects self-esteem; rather, violating widely held expectations about the social roles that are deemed “appropriate” for one’s gender and birth cohort may threaten self-esteem (Jackson, 1966).

At first inspection, it also appears that widowed women have significantly higher self-esteem than their married counterparts. At closer inspection, however, the results show that the consequences of widowhood for women’s self-esteem are conditional upon the emotional nature of the marital relationship. The self-esteem gap among widowed and married women increases as emotional dependence on one’s spouse increases. Living in an emotionally dependent marriage may negatively affect women’s self-esteem, yet surviving the loss of such a relationship may

FIGURE 2A. PERSONAL GROWTH AMONG THE BEREAVED (WAVE 2), BY GENDER AND SOCIAL SUPPORT FROM FRIENDS (WAVE 1)

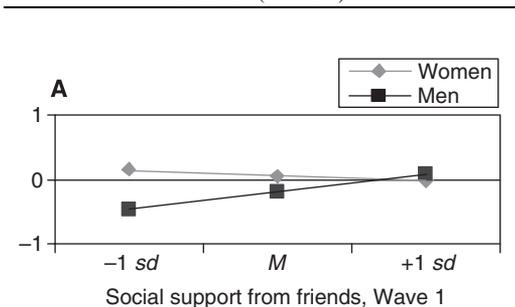
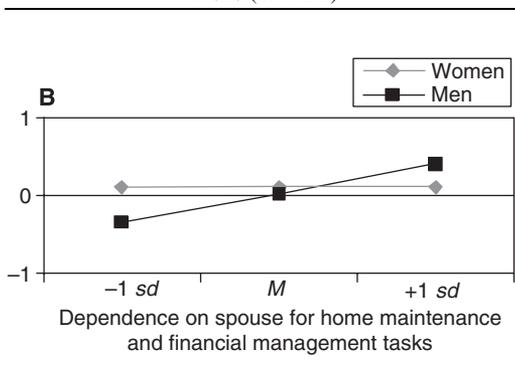


FIGURE 2B. PERSONAL GROWTH AMONG THE BEREAVED (WAVE 2), BY GENDER AND DEPENDENCE ON SPOUSE FOR HOME MAINTENANCE AND FINANCIAL MANAGEMENT TASKS (WAVE 1)



enhance women's self-regard. Widowed women may receive self-esteem benefits from the realization that they have withstood and survived an event that had earlier seemed insurmountable.

These findings suggest that the observed consequences of widowhood vary based on which married people are used as the comparison standard. Although other studies have suggested that marriage is uniformly beneficial (Waite & Gallagher, 2000) or that it is consistently more beneficial for men than women (Bernard, 1972; Gove, 1972), my findings underscore the observation that marriages are highly diverse, and that some married persons have poorer psychological well-being than their widowed peers. Although family scholars conceptualize widowhood as a social problem and often propose interventions to help the newly bereaved adjust to the loss of his or her spouse (e.g., Wortman & Silver, 1989), my findings suggest that attention also should be paid to preserving the self-esteem and emotional well-being of older persons whose marriages may be a source of distress.

### *Perceived Growth Reflects Support From Others*

Widows report higher levels of personal growth 6 months after their loss than do widowers. The gender gap declines considerably when emotional support from friends is considered, however. Widowers' distress has been attributed to the fact that men have few sources of emotional support other than their spouses (Lee, 1988; Lee et al., 2001), yet my analysis shows that bereaved men with high levels of support fare as well as bereaved women.

A surprising finding is that a woman's personal growth is negatively related to her emotional support from friends, albeit very weakly. Women with rich support networks may be less likely to tackle new tasks and become self-sufficient, instead relying on their friends. Through the performance and mastery of new tasks, women may experience the greatest levels of personal growth (e.g., Lopata, 1973). This surprising finding may be specific to women born in the early 20th century, however; studies of younger divorced women reveal that social support from friends is an important source of well-being, and helps to promote personal growth and self-sufficiency (Fassinger, 1993).

Taken together, my findings suggest that gender differences in adjustment to loss do not reflect immutable characteristics of men and women. Rather, the analyses showed that the gender gap in self-esteem and personal growth is conditional upon how support is exchanged within one's marriage. Importantly, the gender gap in adjustment to loss either attenuated, disappeared, or reversed when gender-by-marital dependence interaction terms were considered. These findings highlight the limitations of research that simply identifies gender differences in bereavement-related outcomes and then attributes these differences posthoc to marital characteristics along which men and women *typically* differ. Although dichotomous indicators of "male" and "female" provide researchers a simple shorthand way of identifying gender differences in personal experience, future research should move toward documenting and explaining the sources of within-gender differences and between-gender similarities in how older adults cope with widowhood (Maccoby & Jacklin, 1984; Martin, 1994).

### *Limitations*

This study has several limitations. First, I focused solely on surviving spouses' dependence on their

late spouses, rather than late spouses' dependence on the survivors. Future research should examine how being depended upon within marriage affects survivors' adjustment to loss. Although some spouses may be relieved to be spared of onerous caregiving responsibilities (Davidson, 2001), others may feel that an important source of identity and purpose has been lost. A further limitation is that I did not consider other sources of instrumental support that may be available to older adults, either before or after the loss of spouse. Older spouses who have the economic resources to hire domestic help or financial advisors or who can turn to their relatives or friends for instrumental support may be best equipped psychologically and practically for widowhood, regardless of how dependent they were on their spouses.

My analyses also focused on a relatively narrow slice of positive adjustment indicators. Self-esteem assessed only a general overall evaluation of one's self-worth; future research should focus on both self-esteem in specific domains and other aspects of positive adjustment, including the pursuit of new relationships and interests, the development and maintenance of identities other than spouse, and the rekindling of old interests or relationships that may have been neglected during one's marriage. Further research also should identify additional predictors of personal growth following loss. The analyses presented here explain only a small proportion of the variance in perceived personal growth (with adjusted *r*-square values ranging from just .05 to .08). One fruitful avenue may be a focus on the activities, interests, relationships, and hobbies that bereaved persons actively identify and pursue, rather than focusing simply on those household responsibilities that they are forced to take on following loss.

The CLOC sample also is selective in several ways. First, persons who participated in the Wave 2 interview were younger, less anxious, and more likely to be homeowners than were sample dropouts. Second, by design, all members of the CLOC study were community-dwelling English speakers in a married couple where the husband was age 65 or older, and physically and cognitively capable of participating in the interview. As a result, sample members include persons with distinct social, psychological, and health advantages and thus may be most resilient in the face of loss. Caution should be taken in generalizing these findings to the larger population of older

widowed American adults, given the sample's selective characteristics.

Finally, the initial CLOC interview took place anywhere from 9 months to 6 years prior to the time of the follow-up interviews. Although the duration between the widowhood event and the follow-up interview is precisely 6 months for all widowed persons, because of variation in the timing of death, the preloss indicators are more temporally distant for persons who were bereaved at later dates (i.e., a longer time since the initial interview). Although the effects of the marital dependence indicators on psychological adjustment do not differ based on how early these measures were obtained (as evidenced by interaction term analysis), it is possible that the effects of some control variables on psychological adjustment may vary based on how long ago they were measured.

#### CONCLUSION

Despite these limitations, this study has important implications for understanding adjustment to loss among both current and future cohorts of bereaved spouses. Over the past 40 years, men's and women's social roles have slowly become more similar in the home and workplace, and future generations of older adults may be less likely than current cohorts of older adults to specialize in the tasks traditionally recognized as "men's work" (such as home repairs and financial management) and "women's work" (such as meal preparation and child care). As expectations for the roles of husband and wife are continually redefined (Gergen, 1991), future bereavement researchers may do well to move away from asking the question, "Who suffers more, widows or widowers?" and instead focus on eliminating those sources of inequality within and outside the marriage that pose the greatest challenges for bereaved spouses.

#### NOTE

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