

Widowhood and Intergenerational Support in Contemporary China

Zhenmei Zhang  
Chuntian Lu

Department of Sociology  
Michigan State University

(Long Abstract)

## Introduction

China is aging at an unprecedented speed due to its rigorous family planning program over the past several decades and significant improvement in life expectancy. In 2001, the average life expectancy for the Chinese has reached 71.8 years. Whereas in 1993, China had 63 million elderly aged 65 and older, it is predicted that the number will reach 331 million by 2050, accounting for 23.1% of China's population (Zeng and George 2000). For many elderly people, one inevitable and difficult role transition is from being married to widowhood. Widows and widowers are a vulnerable group at old age because the loss of a spouse can bring financial hardships and emotional anguish. It will also bring changes in family dynamics. In the developed countries, voluminous research on widowhood has been carried out in the past several decades looking at adjustment to spousal loss and the role of children, friends/relatives, and community in helping the widowed (Carr, Nesse, and Wortman 2006). In sharp contrast, surprisingly little research has been carried out in China focusing on widowhood. A literature search in major social science research databases (e.g., *Social Science Citation Index*, *Social Science Abstracts*, *Sociological Abstracts*, and *Proquest*) produced a dozen papers in total since 1980s examining various issues of widowhood but none focused on intergenerational support in widowhood per se. We also found that widowhood was frequently used as a control variable in prior research on intergenerational transfers. In this paper, our aim is modest: we try to find out the characteristics of widowed men and women in contemporary China, the determinants of intergenerational support in old age, and the sources of the support.

The present study used the third wave (2002) of the Chinese Longitudinal Healthy Longevity Survey (CLHLS). Our paper contributes to the literature on widowhood and intergenerational support in a number of ways. First, we used a current, large nation-wide

random sample to examine multiple dimensions of intergenerational support in widowhood including living arrangements, the receipt and sources of financial support, emotional support, and sick care. Previous research in this area was largely based on data sets collected in the 1980s and early 1990s in a few large Chinese cities that focused on financial and material support only (Bian, Logan, and Bian 1998; Liang, Gu, and Krause 1992; Liu, Liang, and Gu 1995; Whyte 2003). Due to the difficulties of getting reliable data in rural areas where 75 percent of the Chinese population lived (Liang, McCarthy, Jain, Krause, Bennett, and Gu 2000), what we knew about intergenerational support in rural area is largely based on anthropological studies (e.g., Ikels 2004) with the exception of Silverstein and his coauthors' research in rural Anhui province (Silverstein, Cong, and Li 2006). Due to significance differences in living standard, family size, pension and health insurance coverage, as well as the diffusion of western values such as individualism in rural and urban China, old age support pattern may differ in rural and urban areas. Second, we focused on widows as well as widowers. Third, we also examined sources of support. Prior studies on intergenerational support often focused on adult children and ignored the role of other relatives (e.g., grandchildren, daughters-in-laws), who might provide important instrumental and emotional support for the widowed. Fourth, our data used a unique sampling strategy and included a significant number of the oldest old (aged 80 and above), the fastest growing segment of the old population. Previous research often focused on the young old (younger than 80). The oldest old population is often at higher risk of experiencing physical and cognitive impairment compared to the young old and in greater need of financial, emotional, physical care (Zhang 2006, Zimmer 2005).

## **Filial Piety and Determinants of Intergenerational Support in China**

The Confucian ideals of filial piety played an important role in understanding the intergenerational support in China. For thousands of years, China was a patrilineal and patrilocal society and, traditionally sons and their spouses (eldest sons in particular), were responsible for taking care of their aged parents. Although current legislation required that daughters share responsibility equally with sons in providing for their parents in old age, many elderly Chinese still did not expect support from their daughters and regard their sons as the best source of support (Miller, 2004). This partially explained the stubbornly strong preference for sons in contemporary China. Previous research found that old age support was largely determined by the following factors: parents' resources and needs, reciprocity, and availability of children (Lin, Goldman, Weinstein, & Lin, 2007).

### *Parents' resources and needs.*

Recent research in China largely supported the needs-based transfer model (or the altruistic model) which suggested that intergenerational transfer is strongly associated with the needs of the parents (Lee and Xiao 1998). In urban areas, those elderly who received retirement benefits were less likely to receive money from their adult children than those who did not have retirement benefits. In addition, those elderly persons who enjoyed relatively higher income and education achievement were less likely to receive financial support from their children. In rural China, elderly with lower income were also more likely to receive support. Rural residents also were more likely to receive money from their children compared to their urban counterparts due to their greater needs (Lee & Xiao 1998). Research on living arrangements shows that functional impairment of the elderly, women in particular, often increased the likelihood of coresidence with children (Zimmer 2005).

### *Availability of Children*

Due to both cultural norms and the lack of social security system for old people in China, adult children are expected to shoulder the bulk of support for their parents. Previous research has shown that parents with a larger number of living children are more likely to receive financial support from their children (Lee & Xiao, 1998). In addition, traditionally sons have the obligation to take care of older parents, and recent research in urban China found parents are still more likely to live with married sons than with married daughters. However, a surprising finding is that married daughters actually provide more financial support to older parents than married sons after controlling for living arrangements (Xie & Zhu 2006)

### *Reciprocity*

Although both cultural norms and legislation stipulated that adult children and grandchildren have the responsibility to take care of the elderly, in reality, the old age support still depends much on the consciousness of sons and daughters. Some researchers argued that intergenerational transfer is contingent upon by the history of the parent-child relationship. For example, in several Asian countries that shared the ideal of filial piety, there is evidence that elderly parents who have provided childcare or contributed to the children's household were more likely to receive money from their adult children than those parents who did not. In addition, recent research in Taiwan found that parents who experienced divorce or separation were less likely to receive support from their adult children compared to the continuously married parents (Lin et al, 2006). In China, both divorce and remarriage are still frowned upon, and children usually opposed their parent's remarriage. The estranged parent-child relationship may influence intergenerational transfers in old age.

## **Data and Measures**

### Data

The data in this study come from the third wave of the Chinese Longitudinal Healthy Longevity Survey (CLHLS). Started in 1998, the CLHLS was fielded in randomly selected half of the counties/cities in 22 out of 31 provinces of China. The surveyed areas covered about 85% of the total Chinese population. Local aging committees provided name lists of centenarians in randomly selected counties/cities, including persons residing in institutions. For each centenarian with a pre-designated random code, one nearby octogenarian and one nearby nonagenarian with pre-designated age and sex were interviewed. The term ‘nearby’ mainly indicate the same village or the same street if applicable, or the same town, county, city. The aim of this special sampling was to have comparable numbers of randomly selected male and female octogenarians and nonagenarians at each age from 80 to 99. In the third wave in 2002, sample subjects were extended to include the elderly aged 65 to 79 as a comparison with the oldest-old. The principle of the sampling of the young elderly is similar to those aged 80 to 99. In spite of its complex design, the sampling strategy is random in its nature. A more detailed description of the sampling design and data quality of the CLHLS appears elsewhere.

This study focuses on 10,505 widowed respondents aged 65 to 105 in 2002. Those who reported being aged 106 or older were excluded because of insufficient information to validate their extremely old age.

### Measures

#### Dependent variables

We examined four types of intergenerational support: (a) Living arrangements; (b) emotional support; (c) sick care; (d) net financial transfer between older parents and their adult

children. In addition, we examined the sources of emotion support, sick care, and net financial transfer. Living arrangements had three categories: coresidence with children and/or grandchildren, living in institutions, and living alone or with others (e.g., siblings, other) . Emotional support and sick care were assessed with the following questions: “To whom do you talk first when you need to tell something of your thoughts”? and “ Who take care of you when you are sick?” The applicable response categories for the widowed elderly include: sons and their spouses; daughters and their spouses; son and daughter; grandchildren and their spouses; other relatives; friends/neighbors; social workers; matron; nobody. A dichotomous variable was created that equal to 1 if adult children and their spouses or grandchildren and their spouses was mentioned and zero otherwise for the two questions respectively. Information about the financial transfer between widowed parents and their adult children in 2001 was collected. We created a dichotomous variable that equal to 1 if the net flow from adult children to parents is positive, and 0 otherwise.

### Independent variables

*Widowed older adults' characteristics.* Based on previous literature, we included the following characteristics of the widowed: education, pension, and ADL disability and the number of living children. Education is a dichotomous variable with those received 1 or more years of schooling coded as 1, and 0 otherwise. Those who had pension was coded as 1, and 0 otherwise. Persons are defined as “ADL disabled” if they report that they cannot perform *one or more* of the following activities independently: bathing, dressing, eating, indoor transferring, toileting, and continence. In addition, we included older adults' marital history: divorce (yes or no), remarriage (yes or no), and years of widowhood.

*Demographic variables* included age (dummy-coded for age groupings: 65-79, 80-89, 90-99, and 100-105), sex (male vs. female), ethnicity (Han vs. Non-Han), and current residence (urban vs. rural).

### Analytic strategy

We begin the analysis by comparing the characteristics of widow and widowers in old age. Then we use multivariate models to examine the effects of widowed older adults' characteristics and their family structure on the likelihood of receiving four types of support from their offspring. Because Chinese society is stratified by rural/urban residence and gender, the associations between widowed older adults' characteristics and the likelihood of receiving support may differ by their current residence and gender, therefore we will test potential interactions between each of the explanatory variables and the widowed persons' current residence as well as gender respectively.

## **Preliminary Results**

### *Descriptive Information*

Our preliminary results show that 73.3% of widows and 68.4% widowers lived with their children and/or grandchildren (children thereafter), 21.8% of widows and 25.5% widowers either lived alone or with others (sibling, parents, etc.), and about 5-6% of widowed elderly live in institutions. The majority of widowed older parents received financial support from their adult children (93% of widow and 87% of widowers). Widows on average were older than widowers. In our sample, one third of widows were centenarians compared to 16.7% of widowers. As expected, divorce was rare among this group of older Chinese. Only 1.7% of widows and 3% of widowers have experienced divorce. As for remarriage, about 9% widows and 14% of widowers have been married more than once. The mean of current widowhood duration was about 28

years for women and 18 years for men. There were sharp differences in the economic well-being of older widows and widowers. Only 16% of widows had received some education compared to 61% of widowers. Whereas one quarter of widowers had pension, less than one tenth of the widows had pension. Older widows also on average had more disabilities in ADLs than widowers. Nearly 80% of widowed elderly were in rural areas and the majority of them were Han.

### *The Likelihood of Receiving Support*

Next, we examined the likelihood of receiving four types of intergeneration support. We used the multinomial model to estimate the likelihood of coresiding with children. We found that the number of ADL disabilities and education was significantly associated with living with children. However, the receipt of pension significantly reduced the likelihood of coresiding with children and increased the likelihood of living in an institution. Divorce and remarriage were not significantly associated with widowed older adults' living arrangements. Years of widowhood were significantly associated with coresiding with children. As for demographic controls, higher age significantly increased the likelihood of coresidence with children.

We used logistic regression to examine the likelihood of having children as confidants, having children as caregivers in sickness, and having received financial support from adult children in the past year. In all the models we controlled for demographic variables and living arrangements. There are some interesting results. Although older widows and widowers were more likely to live with their children when they had ADL limitations, the odds of having children as their confidants decreased slightly with each additional increase of ADL limitations ( $p < .1$ ). Widowed people's SES was not associated with the odds of having children as their confidants. However, the number of children was significantly associated with the odds having

children as their confidants. Marital history had a significant impact on the odds of having children as confidants. Even in widowhood, the remarried ones were significantly less likely to name their children as their confidants compared to those who were continuously married before losing their spouses. The effect of divorce was marginally significant. It also reduced the likelihood of the widowed naming their children as their confidants in old age. Living arrangements also had significant impact. Compared to those living alone or with other, those living with children were significantly more like to name their children as their confidants.

As for having children as caregivers in sickness, the number of disability limitations was negatively associated with the odds of having children as caregivers. It is possible that when older adults have multiple ADL limitations, outside helper (e.g., matron in cities) may be needed to take care of him or her. Having pension also significantly reduced the odds of having children as caregivers in sickness. As expected, the number of children, living with children, and living in rural areas significantly increased the odds of having children as caregivers in sickness.

In terms of net financial transfer, we limited our analysis to those who had at least one living adult children. The number of ADL limitations, the number of children, living with children and being a widow significantly increased the odd of receiving financial support from their children. As expected, having pension significantly reduced the likelihood of receiving financial support from adult children. Remarriage significantly decrease the odds of receiving net financial transfer from adult children.

### *The Sources of Support*

The sources of support are diverse for this group of widowed Chinese. Take financial support for an example. Among those who had both sons and daughters, the majority (78%) received money from both sons and daughters in 2001, 16% received money only from sons, and

6% received money only from daughters. As for confidantes, 58% widowed respondents named both sons and daughters, 12% named sons and their spouses, 11% named their daughters and their spouses, 12% named friends/matrons/social workers, and 6% named their relatives. Most widowed Chinese (69%) reported that both their sons and daughters took care of them when they were sick. These results demonstrated that both sons and daughters provide sick care, emotional support, and financial support to their widowed parents in contemporary China.

In additional analysis, we also looked at who was the main caregiver of those who needed help in ADL (bathing, dressing, eating, indoor transferring, toileting, and continence). We did separate analysis for widows and widowers. There were several important findings. First, among widows who needed help in ADL, about 30-40% of widows mentioned their daughters-in-law as the caregivers in various activities of daily living; about 12-20% mentioned their daughters as caregivers; 8-20% mentioned their sons, and 11-14% mentioned that it was their grandchildren who helped them in activities of daily living. When we looked at widowers, sons played a much bigger role in helping their widowed fathers with activities of daily living than either daughters-in-law or daughters. About 40-50% of widowers mentioned that their sons helped them when they needed help in bathing, dressing, toileting, transferring, continence, and 28% of widowers said their sons also helped feeding them. Daughters-in-law played an important role in helping the widowers in terms of feeding (21%), dressing (14%), transferring (10%) and continence (11%). About 13-20% of widowers also were helped by their grandchildren in ADL. Daughters played a less important role in helping their widowed disable fathers. Obviously, most widowed parents lived with their sons, so their sons' family (sons, daughters-in-law, grandchildren) played a major role in helping the widowed older adults who had ADL disability. This clearly showed that in China, the most intensive daily caregiving were shouldered by close family members,

sons and daughters-in-law in particular. Elderly widows and widowers in the future who have ADL limitations will face tremendous challenges when they have much fewer children and the children may live elsewhere.

We will test whether widowed persons' characteristics interact with their residence and gender to influence the likelihood of receiving support in additional analysis.

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