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Editorial on the Special Issue "Changes in Educational Homogamy and Its Consequences"*

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Abstract: Recent decades have seen major changes in the educational profiles of the populations of Western industrialised countries, notably a sharp rise in educational attainment and a reversal of the gender gap in education. These trends are likely to have affected patterns of educational assortative mating and its consequences. In this editorial, we first review the empirical evidence on educational assortative mating patterns over the last two decades. Specifically, we examine whether educational homogamy has increased among the highly educated, whether women are now less likely to marry upward across cohorts, and whether the rates of relative educational homogamy in populations have increased. We also examine the factors that explain trends and cross-country differences in educational homogamy. Second, we review the consequences of educational homogamy for several important social outcomes, in particular partnership stability and union dissolution, fertility, and children's educational attainment. Is educational homogamy increasingly affecting these outcomes, and if so, in what ways and why? Third, we identify research gaps regarding educational assortative mating and its consequences. The six empirical studies in this special issue attempt to fill some of these gaps. We briefly outline these studies and their main findings and point to implications for future research.

Keywords: Assortative mating · Educational Homogamy · International Comparison · Absolute and Relative Homogamy · Consequences of Homogamy · Fertility · Union Dissolution and Divorce · Inequality in Educational Outcomes

1 Introduction

"Who mates with and marries whom?" is a classic question in sociology and demography (*Berent* 1954; *Blau/Duncan* 1967; *Blossfeld/Timm* 2003; *Blossfeld* 2009;

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Hout 1982; *Kalmijn* 1998; *Mare* 1991; *Schwartz* 2013; *Ultee/Luijkx* 1990). The question carries great importance because the rate of mating between individuals with the same socioeconomic and cultural characteristics – also known as *homogamy* or *assortative mating* – is both a measure of a society's level of social cohesion and of social inequality (*Kalmijn* 1998; *Mare* 1991; *Schwartz/Mare* 2005). High rates of homogamy indicate strong social boundaries between groups and can lead to an erosion of social cohesion through reduced intergroup contact (*Kalmijn* 1998) and to widening social divides – socially, economically, culturally, and politically (*McLanahan* 2004; *Norris/Inglehart* 2019; *Reckwitz* 2019). High rates of socioeconomic homogamy signal low openness of a society's social structure (*Berent* 1954; *Blossfeld* 2009; *Mare* 2016; *Ultee/Luijkx* 1990) and can exacerbate social inequalities in current and future generations, for example, by affecting children's education.

In this special issue, we focus on changes and consequences of *educational* homogamy. We do so because patterns of educational homogamy have implications for many aspects of life, including couple stability, the division of paid and unpaid labour, fertility decisions, the reproduction of inequalities through couple formation, the distribution of resources between households, and health. In addition, patterns of educational homogamy are likely to have changed substantially in recent decades due to the educational expansion and gender gap reversals in education that have occurred in all Western industrialised countries (*DiPrete/Buchmann* 2013; *Esteve et al.* 2016; *Grow/Van Bavel* 2015; *Schofer/Meyer* 2005; *Van Bavel et al.* 2018). For example, educational expansion implies a greater likelihood of meeting and mating with higher-educated individuals, which should increase educational homogamy among higher-educated individuals and decrease educational homogamy among lower-educated individuals (*Grow/Van Bavel* 2015; *Kalmijn* 1998; *Katrňák/Manea* 2020). Individuals' preferences may also have changed as the supply of better-educated partners has increased, raising the minimum level of education they seek in a partner (*Schwartz* 2013).

This special issue provides an updated picture of cross-national and cross-temporal educational homogamy and, following the call of *Schwartz* (2013), new empirical evidence on the consequences of educational homogamy that are currently understudied. We focus on the consequences of educational homogamy for union dissolution and divorce, fertility, and educational outcomes for the next generation. Before presenting the six studies on educational homogamy and its consequences contained in this special issue, we briefly review the state of the literature. Based on this review, we identify research gaps regarding educational homogamy and its consequences. We then outline how the six studies fill some of these gaps.

2 Patterns and trends in relative and absolute educational homogamy

In this section, we first review the empirical evidence on patterns and trends in educational homogamy in Western industrialised countries over the last two decades and then discuss the factors that are thought to be responsible for these patterns and changes.

2.1 Relative educational homogamy

Stratification researchers have mainly focused on *relative* educational homogamy, i.e., educational assortative mating, holding constant the distribution of spouses' education. Scholars do this on the assumption that relative homogamy is a more appropriate indicator of social group distance and a society's openness than absolute homogamy (i.e., the observed patterns of educational assortative mating), as the supply of marriage candidates strongly determines absolute homogamy (*Kalmijn* 1998: 405; *Ultee/Luijkx* 1990). Log-linear models are commonly used to study relative educational homogamy and its changes, as they allow the association between partners' education to be analysed net of (changes in) the supply of marriage candidates (as measured by the educational distributions of men and women in marriage tables). Studies show that educational groups at the top and bottom of the hierarchy are more closed than those in the middle (*Hendrickx* 1994; *Kalmijn* 1998: 409; *Katrňák/Manea* 2020; *Uunk et al.* 1996). There is also a tendency for marriages to be relatively less common the further apart two educational groups are. According to *Kalmijn* (1998: 409), the strongest status boundaries exist between university graduates and the lower educational groups.

For our review of the empirical evidence on changes in relative educational homogamy before 2000, we rely mainly on *Kalmijn* (1998). We then complement his review of trends with more recent evidence focusing on the 21st century. *Kalmijn* (1998) concluded that the empirical evidence on *trends* in relative educational homogamy does not point in a single direction. For example, a comparative study by *Ultee* and *Luijkx* (1990) found that relative educational homogamy on the whole declined slightly in 18 industrialised countries between the Second World War and the 1980s. However, the study found considerable variation in trends across countries, with three countries showing an increase, five showing a decrease, and the remaining ten showing no change. Country-specific analyses revealed either a sharp increase in relative educational homogamy after the Second World War (U.S., Hungary, and Germany), a slight increase (the Netherlands), or stability (Australia and France), but no decline *(Kalmijn* 1998). Conversely, in a large-scale cross-sectional comparison of 65 countries, *Smits, Ultee* and *Lammers* (1998) found an inverted U-shaped association between relative educational homogamy and the level of economic development, indicating a decline in relative educational homogamy in the most developed societies.

The largest cross-national comparative trend study of relative educational homogamy at the time, by *Smits, Ultee* and *Lammers* (2000) for 60 countries, showed that relative educational homogamy had generally declined. However, the decline was small, related to the 1940s-1970s, and involved a comparison of only two points in time. Moreover, the study showed considerable cross-country variation in the level of relative educational homogamy and its trends. *Smits* (2003) also found a decline in relative educational homogamy among those with a secondary degree or higher education in 55 countries, but again used rather old data from the 1970s and 1980s. Using more recent data from six European countries between 1990 and 2016 (Sweden, the Czech Republic, Slovakia, Poland, Hungary, and Italy), *Katrňák*

and *Manea* (2020) also observed a trend towards weaker relative homogamy among those with tertiary education. However, they noted that relative homogamy became stronger among people from lower educational groups. These education-specific trends were quite similar across the countries analysed.

2.2 Absolute educational homogamy

Although measures of relative educational homogamy may be better indicators of societies' openness (*Kalmijn* 1998: 405; *Ultee/Luijkx* 1990), measures of absolute educational homogamy (i.e., the observed patterns of educational assortative mating) are also important and informative. Absolute educational homogamy affects several important social outcomes and has implications for social cohesion and socio-economic inequalities in current and future generations (*Leesch/Skopek* 2023; *Schwartz* 2010, 2013).

Ultee and *Luijkx* (1990) found that absolute educational homogamy declined after the Second World War until the 1980s, but they also observed considerable cross-country variation in levels and trends. A more recent study by *De Hauw, Grow* and *Van Bavel* (2017) found little change in absolute educational homogamy across 28 European countries, covering the birth cohorts of the 1950s, 1960s, and 1970s. In contrast, *Katrňák* and *Manea's* (2020) observed an increase in absolute educational homogamy in six European countries between 1990 and 2016.

Studies on absolute educational homogamy often distinguish between couples where the man is more educated than his partner (*hypergamy*) and couples where the woman is more educated than her partner (*hypogamy*). There have been several trend studies on educational hypergamy and hypogamy. *Mare* (1991) observed a decline in hypergamy in the U.S. *Esteve, Garcia-Román* and *Permanyer* (2012) compared changes in hypergamy in 56 countries between the 1970s and 2000s, also finding a decrease. More recently, *De Hauw, Grow* and *Van Bavel* (2017) looked at 28 European countries, comparing respondents born in the 1950s and the 1970s, and documented a decline in hypergamy and an increase in hypogamy (*De Hauw et al.* 2017: 456). *De Hauw, Grow* and *Van Bavel* (2017) also compared hypergamy and hypogamy with remaining single. They observed that in younger cohorts, highly educated women are increasingly more likely to marry downwards than to remain single, and medium-educated women are less likely to marry upwards. Men, on the other hand, are not more likely to marry upwards and are more likely to remain single. *Erát* (2021) confirms these findings using the same dataset but more refined cohort measures. Similar conclusions on the decline of female hypergamy are reached by *Katrňák* and *Manea* (2020) for six European countries between 1990 and 2016 and by *Han* (2022) for 34 developed and emerging countries between the 1960s and 2015.

2.3 Drivers of variation in assortative mating

Mating behaviour is the result of a combination of factors (*Blossfeld* 2009; *Kalmijn* 1998; *Schwartz* 2013). Using mate selection theories, scholars have generally

emphasised three factors in mate selection: (a) the constraints or opportunities of the marriage market in which individuals seek a spouse ("the structural component"), (b) individuals' preferences for certain characteristics in a spouse, and (c) the influence of the social group to which individuals belong ("third parties" and the family origin; for a more detailed review of theories and factors of assortative mating see *Kalmijn* 1998 and *Schwartz* 2013).

Comparative research on educational homogamy has rarely used micro-level theories of mate choice, and their drivers have not been extensively tested (but see *Han* 2022; *Leesch/Skopek* 2023). One reason for this is that absolute homogamy patterns have been seen as less important for social stratification, and that marriage market constraints have largely been considered as something to "control for" rather than to focus on. Another reason is that conventional survey data provide little insight into mate choice processes or the relevance of preferences.

Scholars investigating cross-temporal and cross-national variation in *relative educational homogamy* have mainly focused on factors affecting societal openness. *Ultee* and *Luijkx* (1990) found that a country's social mobility and social democracy reduce the extent of relative educational homogamy. *Smits, Ultee* and *Lammers* (1998) found that the level of economic development (inverted U-shape effect; see also *Smits et al.* 2000), the degree of political democracy (negative effect), a country's dominant religion, and the technological background of developing countries (mixed effects) affect relative educational homogamy. *Bouchet-Valat* (2018) also showed an effect of economic development (negative effect) on relative educational homogamy at the regional level, comparing 149 regions in 26 countries in the European Union. *Domanski* and *Przybysz* (2007) documented that political democracy and post-communist status lowered relative educational homogamy among European countries, but found no effects of economic development and a country's dominant religion. *Katrňák, Fučík* and *Luijkx* (2012), in addition, demonstrated that a country's intergenerational educational reproduction is positively associated with relative educational homogamy.

Nevertheless, a few comparative studies of educational homogamy highlight the importance of more immediate mate selection factors, derived from theories of mate selection. *Blau* (1977; *Blau et al.* 1982) was one of the first scholars to study the effects of marriage market constraints on homogamy patterns. He emphasised that the effects of these marriage market constraints, such as group size, sex ratio, and heterogeneity, were non-trivial and important. Relative group size was negatively associated with outmarriage (e.g., for black outmarriage and occupational intermarriage), and a population's heterogeneity was positively associated with intermarriage (e.g., racial intermarriage; *Blau et al.* 1982). A recent cross-national comparative study by *Permanyer, Esteve,* and *Garcia* (2019) studies the effect of such factors on educational homogamy, focusing on the effects of educational expansion, the reversal of the gender gap in education, and assortative mating on a country's *absolute educational homogamy*. *Permanyer, Esteve,* and *Garcia* (2019) found that the expansion of university education was the main driver of the increase in absolute educational homogamy, rather than the reversal of the gender gap in education, or assortative mating (which barely increased). *Leesch* and *Skopek* (2023),

comparing cohorts for Ireland, also demonstrated that educational expansion, but not assortative mating, was responsible for the increase in educational homogamy. In addition, they found that changes in the educational gradient in marriage – more educated women are now more likely to marry or cohabit than less educated women – contributed in part to the increase in educational homogamy. This finding seems to support the role of marriage market opportunities for mate selection. On the other hand, educational expansion implies fewer opportunities for educational homogamy among the less educated, something which *Permanyer, Esteve,* and *Garcia* (2019) did not investigate.

The importance of marriage market constraints and the "logic of numbers" has also been emphasised in studies explaining differences in socioeconomic hypergamy and hypogamy across time and countries. Drawing on *Blau's* (1977) macro-sociological ideas about the effects of gender imbalance, scholars have been interested in whether the reversal of the gender gap in education would lead to women marrying up less often and marrying down more often. *Erát* (2021) finds evidence for this "squeeze" hypothesis, showing a strong negative correlation between a country's female educational advantage and hypergamy. Interestingly, this correlation was weaker for younger cohorts. *Han* (2022) also supported this hypothesis in a large-scale cross-national comparison of educational hypogamy. However, *Han* (2022) pointed to a possible alternative interpretation, namely that the extent of educational hypogamy could also be related to the economic empowerment of college-educated women, according to which economically successful women would be less attractive in marriage markets. He found an effect of economic empowerment even after controlling for the mating squeeze effect. In most countries, however, the empowerment effect was smaller than the squeeze effect. *De Hauw, Grow* and *Van Bavel* (2017) further supported the squeeze hypothesis with cross-national comparative data.

Highlighting the need to study assortative mating from a dynamic perspective, *Corti* and *Scherer* (2021) investigate the relationship between structural partner market constraints and the timing and educational sorting of first intimate unions in Germany (1985-2018). They integrate the literature on the effect of the reversed gender gap in education on educational assortative mating (*De Hauw et al.* 2017) with a focus on mating dynamics and measures of the partner market over the life course (*Eckhard/Stauder* 2019). The results for Germany show that the local education-specific mating squeeze influences partnership formation, timing, and educational sorting and that, in line with search theory (*Lewis/Oppenheimer* 2000), the mating squeeze decreases after the age of 30. This applies both to the risk of remaining single and to the risk of forming a hypogamous partnership.

The effects of (gendered) educational expansion on mating patterns can also be interpreted in terms of changing *preferences* for educational homogamy, e.g., raising the minimum level of education that people seek in a partner (*Schwartz* 2013). Research on mate selection has rarely examined the influence of preferences and normative influences (such as peers or family) on mate choice (*Kalmijn* 1998). This is largely because conventional survey data often do not include information on the processes of mate search or the relevance of preferences and norms. However, online

dating data and agent-based modelling are promising solutions to address some of these research gaps (*Grow/Van Bavel* 2019), although findings from selected online dating samples may not be generalisable to broader populations (*Van Bavel* 2021). Online dating data often include information about users' partner preferences and the frequency of interactions. Useful insights can also be gained from simulations. Agent-based modelling allows researchers to make assumptions about structural constraints, preferences and norms, and to feed these into computer simulations along with empirical information (*Grow/Van Bavel* 2019). These models can be used to test whether particular preference assumptions and structural constraints lead to observable empirical patterns of homogamy and whether different preference patterns can lead to similar outcomes (*Grow/Van Bavel* 2019).

The original contribution by *Uunk* (2024) in this special issue adds to the literature on educational homogamy by providing updated information on trends and cross-national differences in absolute and relative educational homogamy in Europe in total and by educational group. In addition, he investigates the effect of structural opportunities for mate selection by examining how various factors of the educational distribution of populations (e.g., educational expansion, heterogeneity, and gender symmetry) affect educational homogamy.

3 Consequences of homogamy

While patterns of educational assortative mating have been extensively studied, at least descriptively, the consequences of homogamy remain an under-studied topic in the literature. This special issue aims to address this shortcoming. Patterns of educational homogamy and their change have implications for many aspects of life, including couple instability, the division of paid and unpaid labour (*Blossfeld/Buchholz* 2009; *Bonke/Esping-Andersen* 2011; *Dechant/Schulz* 2014; *England/Srivastava* 2013; *Greenstein* 1996; *Grow et al.* 2017; *Miller* 2020; *Raley et al.* 2012; *Theunis et al.* 2018), fertility decisions (*Nitsche et al.* 2018; *Trimarchi/Van Bavel* 2020), the reproduction of inequalities through couple formation (*Mare/Schwartz* 2006; *Schwartz* 2013), the distribution of resources between households (*Azollini et al.* 2023; *Breen/Salazar* 2010, 2011; *Breen/Andersen* 2012; *Breen/Ermisch* 2017; *Cancian/Schoeni* 1998; *Grotti/Scherer* 2016; *Grow/Van Bavel* 2020; *Harkness* 2013; *Klesment/Van Bavel* 2017; *Lawrence/Breen* 2016; *Salverda et al.* 2009; *Van Bavel/Klesment* 2017), and health (*Abufhele et al.* 2022; *Pesando* 2022; *Potarca/Rossier* 2022; *Rauscher* 2020). This issue covers empirical findings on three of these consequences: fertility, divorce, and the intergenerational transmission of educational inequality. With the changes in educational homogamy described above – greater absolute educational homogamy among the higher-educated and smaller educational homogamy among the lower-educated (*Katrňák/Manea* 2020, see also *Uunk* in this issue) – the consequences of educational pairings are expected to have undergone corresponding changes. Hypogamy is particularly interesting from this perspective, as women's educational levels continue to rise and couples in which the woman has a higher level of education violate traditional Western gender norms. As hypogamy becomes more common

(*Schwartz/Han* 2014), this status inversion gets normalised, and consequently, some of the consequences previously associated with these partnerships may no longer be relevant (*Miller* 2020).

To underscore the need for this special issue, we also conducted a Web of Science (WoS) search for the three consequences of educational homogamy that we study (divorce and separation, fertility, and the intergenerational transmission of educational inequality). We used WoS's advanced search tool to search SSCI-ranked journal articles published between 1980 and 2023 (see the appendix for information on the exact search algorithms). We then sifted through the results and selected the journal articles relevant to our special issue. In total, we found four articles on the consequences for fertility and seven articles each on the consequences for divorce and separation and on the consequences for the intergenerational transmission of educational inequality. Although our literature search is by no means exhaustive, and these lists can be supplemented by publications not found by the search algorithm (which we discuss below), our search results underscore that the consequences of educational homogamy have been a neglected research topic for over 40 years. Before reviewing existing studies in these areas, we provide a brief overview of how educational homogamy has been operationalised in the literature.

3.1 Operationalising homogamy

Couples and family members are generally assumed to share the same living conditions and life chances, be interdependent, and benefit from family relationships (*Blossfeld/Buchholz* 2009; *Kalmijn* 1998; *Sørensen* 1994: 32-33). Consequently, all members of a family share a unitary position in the stratification hierarchy. Researchers have determined this social position either through a focus on (a) the (typically male) head of the household, as in the conventional approach of traditional class theory (*Goldthorpe* 1983, 1984), or (b) the highest present position, as in the dominance approach (*Erikson* 1984). Although originally developed for social class measures, these approaches have also been applied to education or status measures to define a family's position in society (*Sørensen* 1994: 33). However, all these proposals do not take into account that each partner can make a significant contribution to the family that is either substitutive or complementary (*Becker* 1993; *Oppenheimer* 1994: 333-334). Therefore, an individual-level approach (as opposed to a family-level approach) has been proposed for analysing homogamy's consequences for social outcomes (*Sørensen* 1994). This approach, however, often falls short when considering the relative resources within the couple (*Grow/Van Bavel* 2020; *Klesment/Van Bavel* 2017; *Van Bavel/Klesment* 2017). For many outcomes, including resource-pooling and bargaining, both the level and the relative combination of resources among partners is important (*Oppenheime*r 1994). Taking into account sex-specific resources, the distinction of hyper- or hypogamy has been proposed, depending on which of the two sexes has the higher level of the resource in question (*Becker* 1993). In addition, for some research interests, it might be important to examine whether the consequences of couples' resource combinations depend on their level (*Becker et al.* 2018; *Blossfeld/Buchholz* 2009; *Mare* 2016). Although this reasoning

can, in principle, be applied to any resource, we focus on education in this special issue. These substantive and methodological issues of measuring social positions in terms of educational pairings have become more important over time because the composition of educational resources within couples has changed substantively given massive educational expansion in which women have caught up or even overtaken men in educational attainment (*DiPrete/Buchmann* 2013).

To account for the different resource combinations of couples, various operationalisations of homogamy and heterogamy (the latter of which is sometimes further differentiated into hypergamy and hypogamy) have been used in the literature (both for parental background and own partnership situation), and which measurement should be preferred depends on the research question and theoretical framework (*Eeckhaut et al.* 2013). A methodological debate on the different operationalisations in the literature (for further information, see *Edwards* 2002, *Eeckhaut et al*. 2013 and *Luo* 2022) is still underway (*Abufhele et al.* 2022: 12). The first option is to construct difference scores (*Eeckhaut et al.* 2013), based on metric measures of education. We can distinguish between (a) absolute difference scores, (b) squared difference scores and (c) algebraic difference scores (*Edwards* 2002). The difference scores of options (a) and (b) only have positive values and can, therefore, only distinguish homogamy from heterogamy. Option (c) can also have negative values and can differentiate homogamy from hypergamy and hypogamy. In all these measures, the distance in the education of both partners can be accounted for (*Eeckhaut et al*. 2013). Difference measures are also possible with categorical variables, distinguishing homogamy from hypergamy and hypogamy (*Eeckhaut et al.* 2013). In this simple form, categorical difference measures do not contain information about the educational distance between partners. An advantage of difference measures is that they provide a straightforward method for examining the moderating role of high or low educational resources for homogamy and heterogamy.

Another option is to consider the main effects of both partners' (or parents') education and include an interaction term in the analysis models (*Bratsberg et al.* 2023; *Eeckhaut et al.* 2013; *Sørensen* 1994: 41-42), which allows to model how the effects of the education of one partner depends on the education of the other partner (*Sørensen* 1994). Another possibility is to create compound measures that take into account various combinations of partner education (*Eeckhaut et al.* 2013). If the main effects of partner education are also included in the analysis model, the compound measure is an interaction term (*Eeckhaut et al.* 2013). If the main effects are not controlled for, the main effects of education are part of the compound measure (*Eeckhaut et al.* 2013). A further option is to estimate a diagonal reference model (DRM) or a mobility contrast model (MCM) (*Eeckhaut et al.* 2013; *Luo* 2022: 165; *Sørensen* 1994: 41). In these models, homogamous couples are seen as the core of an educational group that is not influenced by any other educational group and this core is compared to educationally mixed groups (*Eeckhaut et al.* 2013). The papers in this special issue use different operationalisations of resource combination: all contributions examine details in the relative distribution of resources; some not only account for level effects but also examine the relevance of relative resources according to the level of education.

3.2 Homogamy, partnership stability, and divorce risk

Education and its pairing between partners can influence a couple's stability in several ways. This is because education is an indicator of tastes, values, and attitudes, as well as of an individual's labour market prospects and earning potential, and thus socioeconomic status. In general, education makes marriages more stable: marriages with at least one highly educated partner tend to be less prone to divorce (*Frimmel et al*. 2013; *Härkönen/Dronkers* 2006; *Hogendoorn et al*. 2022; *Theunis et al*. 2018). Traditionally, hypergamous couples were expected to have the highest marital stability, as specialisation in paid and domestic work increases the gains from marriage (*Becker et al*. 1977). *Frimmel, Halla* and *Winter-Ebner* (2013) find support for this in Austrian administrative data. At the same time, however, social and cultural similarity promotes consensus between partners on tastes and values and reduces potential conflict over divergent goals (*Kalmijn* 2003; *Kalmijn et al*. 2005). This suggests that homogamous couples are more stable than heterogamous couples. Another factor contributing to union instability is social disapproval from families and peers, which is more likely to occur when social boundaries are crossed, especially in heterogamous unions. If a couple violates conventional norms, as is the case with hypogamous couples in Western societies, social disapproval might become even more relevant. This also suggests that the distinction between hypergamous and hypogamous couples is important. Unconventional combinations may be particularly unstable in contexts where gender equality is not (yet) promoted (*Cooke* 2006; *Theunis et al*. 2018; *Gonalons-Pons/Gangl* 2021) and where unconventional, heterogamous combinations are least common (*Grow et al*. 2017; *Schwartz/Han* 2014).

Several studies suggest that educational homogamy may contribute to partnership stability, but research on the impact of educational homogamy on partnership stability yields mixed results and suggests that the relationship between marital dissolution and the relative status of spouses is both historical and context-specific (*Cooke* 2006; *Gonalons-Pons/Gangl* 2021). In their review study, *Wagner* and *Weiss* (2003) report no strong support for the idea that educational pairings are determinants of divorce risk in Germany. *Kraft* and *Neimann* (2009) also find only limited support for the notion that educational homogamy increases marital stability in Germany, while higher levels of education and religiosity do. However, women's educational advantage (hypogamy) in Germany is associated with a higher risk of union dissolution (*Arpino et al*. 2022). *Fučík* (2023) shows for the Czech Republic that homogamy as such does not lead to more stable partnerships. *Tzeng* (1992) finds for first marriages in the United States (U.S.) that couples with heterogamous education and non-traditional work arrangements are at higher risk of marital instability. For Austria, results suggest that hypogamous couples are most likely to divorce (*Frimmel et al*. 2013). In Finland (*Mäenpää/Jalovaara* 2014) and Israel (*Kaplan/Herbst* 2015), homogamy reduces the risk of separation, but only for the highly educated. Furthermore, extreme heterogamy increases the divorce risk in Finland (*Mäenpää/Jalovaara* 2014). *Schwartz* and *Han* (2014) and *Grow et al*. (2017) document relevant changes in the educational matching and divorce risk in the U.S.: while marriages in

which the wives had an educational advantage were more likely to dissolve in the past, this is no longer the case for more recent marriage cohorts, as partnerships have become less "traditional" and more gender egalitarian. In line with this idea, *Schmid* and *Wagner* (2023) document corresponding changes for West Germany and for younger cohorts: a less traditional division of labour is no longer associated with a higher divorce risk. *Grow et al.* (2017) suggest that these changes in the consequences of homogamy are due to structural changes in the marriage market (the availability of alternative partners) rather than cultural changes.

Overall, it appears that as the social acceptance of hypogamous or homogamous educational pairings increases, the risk of union dissolution becomes more similar to other, more "traditional" combinations. The normative context has also proved relevant in other comparative studies on this topic. For example, *Gonalons-Pons* and *Gangl* (2021) found that violations of the male-breadwinner norm were most strongly associated with marital dissolution in countries with more traditional gender cultures. In line with *Kalmijn* (2003), the above results strongly support the social channels of union stability – i.e., the "cultural" similarity and social recognition – as well as the importance of contextual factors, including normative power relations. Most of this literature has focused on marriage, although cohabitation is becoming increasingly relevant. In this special issue, the studies by *Mazzeo* and colleagues (2024) on Germany and by *Corti* and colleagues (2024) on Italy contribute to this area of research.

3.3 Homogamy and fertility

The relationship between partners' educations and fertility is also complex and context-dependent. There is evidence that women's higher education reduces the number of children (*Becker et al.* 2012; *Chen/Guo* 2022; *Cygan-Rehm/Maeder* 2013; *Kim* 2016; *Ntoimo/Mutanda* 2017), mainly by postponing marriage and childbearing. *Monteiro da Silva, Campos de Lima* and *Ferreira* (2022) show that changes in the educational combination of partners account for about one-third of the decline in cohort fertility in Brazil. However, more recent findings in Europe and the U.S. indicate that although highly educated individuals are having children later, they are having more children (*Nitsche et al.* 2018). In contrast, *DeCicca* and *Krashinsky* (2023) show for Canada that education tends to "compress" fertility, leading to a higher likelihood of having at least one child, but a lower likelihood of having multiple children. Indeed, education affects first births and parity progression differently. The literature suggests that there may be a trade-off between the quantity of children and the quality with which one can raise them (*Vargha/Donehower* 2019), which may be more relevant for the highly educated who have to accept higher costs of children to avoid downward social mobility (*Breen/Goldthorpe* 1997). At the contextual level, the nature of gender roles prevalent in a country (in terms of the equality of men and women in the private and public spheres) is likely to shape the relevance of education for family decisions. Some authors argue that a reversal of the initial negative association between education and fertility will occur as gender equality progresses (*Goldscheider et al.* 2015).

There are several channels linking education and its combination in partners to fertility. Employment situation, occupation, and income are important mediators of this association. In many countries of the Western world, women's employment no longer seems to hinder fertility. In fact, the relationship has become positive (*Ahn/Mira* 2002; *Kravdal/Rindfuss* 2008). An important channel related to educational attainment is the income effect, which facilitates the realisation of fertility desires by coping with costs. According to *Oppenheimer's* (1994) pooling of resources approach, highly educated couples have higher current and expected financial resources and security, which enables them to have more children. More recent literature attributes the higher fertility of more educated couples to a more equal division of gender roles in the household. Regardless of their level of education, educational pairing could influence fertility through the quality and stability of their partnerships and through greater equality within the couple, including in the private sphere. In support of this hypothesis, assortative mating has been found to reduce the likelihood of reproductive failure in the U.S. (*Huber/Fieder* 2011). In the United Kingdom (U.K.), educationally homogamous couples also show higher fertility regardless of social class assortative mating (*Krzyżanowska/Mascie-Taylor* 2014). *Bauer* and *Jacob* (2010) show for Germany that educationally homogamous couples are, on average, more likely to become parents than hypergamous couples and that a traditional education gap at the level of vocational education promotes parenthood. Focusing on completed fertility in Greece, *Bagavos* (2017) documents that differences in fertility outcomes are largely the result of timing effects, except for low-educated partners, who also have higher completed fertility.

Thus, the detailed combination of partners' education affects fertility progression. *Osiewalska* (2017) reports that low-educated homogamous partners have the highest fertility (in France, Bulgaria and Austria), while highly educated homogamous partners postpone their first birth but do not differ in terms of their completed fertility. In a comparative study across European countries, *Nitsche* and colleagues (2018) show that highly educated homogamous couples postpone the first birth in most European countries but have a high probability of second and third births. The authors also report that hypergamous couples with a highly educated man and a less educated woman have the lowest second birth transitions – a finding that contradicts the idea of specialisation in "new home economics" (*Becker* 1993). *Osiewalska* (2017) shows that hypogamy is associated with fewer children in Bulgaria and Austria, but not in France. A paper in this special issue by *Nitsche* (2024) adds to this literature by examining first and second births in the U.S.

3.4 Homogamy and the intergenerational transmission of educational inequality

In the literature, few retrospective and prospective studies analyse the intergenerational transmission and reproduction of educational inequalities through parental homogamy.

The *retrospective approach* examines the link between family background and children's educational attainment starting from the children's generation. However,

not many studies have examined the consequence of parental homogamy as a characteristic of family background. To date, to the best of our knowledge, only five country studies have analysed the association between parental homogamy and children's educational outcomes, covering South Korea (*Byun et al.* 2020), the U.K. (*Gonzalez-Sancho* 2012), Denmark (*Bingley et al.* 2023) and the U.S. (*Beck/González-Sancho* 2009; *Edwards/Roff* 2016). In addition, only one international comparative study has examined the association between parental homogamy/heterogamy and gender-specific educational outcomes across European countries (*Ortiz-Gervasi* 2021).

Theoretically, it is argued that children from educationally homogamous parents should have better educational opportunities due to the pooling of resources, greater agreement on parenting styles, and a lower risk of divorce of their parents. All the mentioned studies suggest that parental homogamy/heterogamy is important for children's educational outcomes. However, little research has examined whether this association is moderated by parental education (*Byun et al.* 2020). For example, the resource pooling argument expects a positive association between parental homogamy and children's educational outcomes only when parents are highly educated. The retrospective study by *Blossfeld, Katrňák,* and *Chromková Manea* (2024) in this special issue helps to fill this gap in the literature and explores how parental homogamy affects children's educational opportunities in different European countries and shows how this association is moderated by parental education.

In the retrospective approach, the starting point for the analysis is a representative sample of children who are asked about their parents. *Duncan* (1966) pointed out that the distribution of parents in retrospective studies does not represent a real distribution at a particular historical time because (1) parents have their children at different ages, (2) childless individuals are not part of the parent sample, and (3) parents may have multiple children and thus be overrepresented. However, *Duncan* (1966) concluded that these objections are not problematic for the analysis of the direct transmission between parents' and children's education (such as parents' influence on children's school performance and educational decisions; *Boudon* 1974). However, if one is interested in (1) the total effect and different pathways of an educational investment in a birth cohort on their offspring's educational attainment (*Breen/Ermisch* 2017; *Lawrence/Breen* 2016) or (2) how distributions at one point in time are transformed into distributions of the next generation, intermediate demographic processes of social reproduction must be considered (*Maralani* 2013; *Song/Mare* 2015). For example, higher education in a parental cohort may have consequences for mate choice, likelihood of marriage, and childbearing.

In recent years, retrospective studies have been complemented by *prospective studies*. These prospective studies examine how educational mobility processes are mediated by demographic processes of social reproduction (*Hillmert* 2013, 2015; *Maralani* 2023; *Mare* 1997; *Mare/Maralani* 2006; *Mare/Schwartz* 2006; *Skopek/Leopold* 2020). The focus is therefore shifting from social mobility to social reproduction, taking into account demographic processes (*Corti/Scherer* 2022). However, these analyses remain rare due to high data requirements, especially in an international

comparative perspective (*Breen/Ermisch* 2017; *Breen et al.* 2019). The starting point for these analyses is a representative sample of respondents at a specific historical point in time who are asked about their descendants (*Song/Mare* 2015). These studies take into account that (1) not all members of a parental cohort contribute to intergenerational reproduction because they remain childless, and (2) some but not all studies collect information on all children of the respondents (*Song/Mare* 2015). The prospective approach is interested in how individuals belonging to different social groups (typically defined by education) vary in the timing and level of marriage, divorce, remarriage, homogamy, fertility, parental and child survival, adoption, and migration (*Song/Mare* 2015), and therefore have different probabilities of having offspring. Existing prospective research has mainly examined differences in assortative mating and fertility processes. As this special issue is concerned with the consequences of assortative mating, we will concentrate on this demographic channel of educational reproduction. Studies from Indonesia (*Mare/Maralani* 2006 2006), South Korea (*Kye/Mare* 2012), the U.S. (*Song/Mare* 2017; *Lawrence/Breen* 2016), the U.K. (*Breen/Ermisch* 2017), Norway (*Bratsberg et al.* 2023), and Germany (*Corti/Scherer* 2022; *Hillmert* 2013, 2015) show that assortative mating is relevant, at least for the social reproduction of women (*Breen/Ermisch* 2017; *Corti/Scherer* 2022). However, assortative mating has become less relevant for the social reproduction of women in Germany over time (*Corti/Scherer* 2022). For the U.S., *Maralani* (2013) also finds black-white differences in the importance of assortative mating for the educational reproduction of women. A comparative paper by *Breen et al.* (2019) on twelve countries (Italy, Germany, Belgium, Sweden, France, the Netherlands, Greece, the Czech Republic, Denmark, Spain, Poland, and Austria) suggests that assortative mating is important for educational reproduction. Nevertheless, international comparative studies on the effects of parental homogamy on educational reproduction are still rare. The cross-national study by *Wittemann* and *Yastrebov* (2024) in this special issue fills a gap in the literature by extending the analysis to Eastern European countries with a cohort comparison.

4 Contributions and conclusions of this special issue

4.1 Contributions

This special issue, "Changes in educational homogamy and its consequences," presents six original studies. The contribution by *Uunk* (2024) responds to the need for an up-to-date, large-scale description of educational homogamy and an assessment of its drivers. The study "*Trends and cross-national differences in educational homogamy in Europe: The role of educational composition*" investigates changes in educational homogamy and extends previous findings by describing and explaining country and cohort differences in absolute and relative educational homogamy in Europe by educational group, focusing on the role of educational composition characteristics. His aggregate-level regression analyses on 36 countries and five birth cohorts (1940-1989) from seven waves of the European Social Survey show that absolute

educational homogamy has decreased for less educated people and increased for more educated people, while relative educational homogamy has hardly changed. Regression analyses of the cross-country cohort variation in educational homogamy show, in line with *Blau's* theory of structural opportunity effects on intermarriage (*Blau* 1977; *Blau et al.* 1982), that the population's educational composition strongly affects rates of absolute educational homogamy. Educational gender symmetry, educational income inequality, and educational reproduction increase rates of absolute educational homogamy, educational heterogeneity decreases these rates, and educational expansion increases absolute educational homogamy among the more educated. Educational composition characteristics also affect rates of relative educational homogamy, but only in terms of gender symmetry and educational reproduction. The results suggest that further educational expansion may increase absolute educational homogamy among the better educated, but that the growing female advantage in education weakens absolute educational homogamy through opportunities for intermarriage.

This first contribution is followed by studies focussing on the consequences of homogamy. Research on the consequences of educational pairing remains limited, and a straightforward consideration of contextual factors is underdeveloped. Four of the five studies adopt a comparative perspective, across cohorts, contexts, or both. The contribution by *Mazzeo et al.* (2024) on union stability considers contextual variation in terms of within-German differences and changes over time, while the study by *Corti et al.* (2024) focuses on cohort succession within Italy. *Mazzeo, Schwartz, Scherer,* and *Vitali,* in their contribution "*Trends in Women's Educational Advantage and Divorce in East and West Germany*", use SOEP data to investigate how the relevance of educational pairing varies across contexts, comparing East and West Germany across cohorts. The authors report a lower stability of educational hypogamous marriages in West Germany, while this is not the case in East Germany. Their finding is consistent with the idea that higher gender equality in the East fosters stability of non-traditional educational pairings. The lack of significant cohort differences confirms that notable differences between East and West Germany persist after reunification. In the contribution by *Corti, Bellani, Guarneri,* and *Rinesi,* "*Partners' age difference and marital dissolution in Italy: A cohort comparison*", the focus is not on educational homogamy but on age homogamy. Using data from the Families and Social Subjects survey, the authors examine the association between the relative age of spouses and the risk of divorce and its change over cohorts for Italy, documenting a stability premium for hypergamous couples (men older), which, however, weakens for more recent marriage cohorts, as divorce risks also increase for these more traditional pairings.

Among the consequences of assortative mating, fertility behaviour has recently received increasing attention, but little is known about the relevance of educational homogamy and the relative resources between partners. Focusing on the U.S., the paper "*Relative Resources in Couples and Their Childbearing Behaviour in the U.S.*" by *Nitsche* (2024) provides insights into the variation in fertility patterns due to differences in bargaining over fertility within heterogamous and homogamous couples. The author shows that first births are not related to the relative education

of the partners, but highly educated homogamous couples have a higher risk of second births. Interestingly, and in line with the idea of changing gender roles, relative income and gender-specific work arrangements show no association with childbearing.

Finally, the consequences of parental assortative mating for the intergenerational transmission of inequality are examined, which is also a largely under-researched topic. In this special issue, two complementary contributions, both of which compare European countries, are devoted to how parental homogamy and homophily are related to educational inequality in the next generation. A retrospective study by *Blossfeld, Katrňák,* and *Chromková Manea* (2024), "*Parental educational homogamy and children's educational attainment in Europe*", sheds light on how different constellations of parental educational pairings are related to their children's educational outcomes for a large number of European countries and how this association is moderated by parental education. They find that parental homogamy increases the likelihood of children obtaining a tertiary degree in European countries. However, this association varies across countries. In addition, they show that parental homogamy increases the probability to obtain a tertiary degree particularly of children from higher educated families. In contrast, the study by *Wittemann* and *Yastrebov* (2024), "*Untangling the Role of Assortative Mating in Prospective Educational Mobility in Twelve European Countries*", takes a prospective approach and uses data from the Generations and Gender Survey and a series of prospective datasets to examine how demographic mechanisms such as assortative mating and the related fertility behaviour contribute to the intergenerational transmission of educational inequality in twelve European countries. They find that fertility does not play a large role in the intergenerational transmission of educational inequality, but that parental homogamy does. Overall, this special issue covers a wide range of geographical areas in Europe and the US and each article addresses an understudied issue of homogamy.

4.2 Conclusions

Notwithstanding the contributions in this special issue, *future research* needs to address a number of open points to improve our understanding of educational homogamy and its consequences. Among the factors explaining patterns of assortative mating, changing structural opportunities and changing preferences figure prominently. Direct measures of preferences are almost non-existent, and we still need a much better assessment of the role of different structural opportunities for educational homogamy – including institutional factors such as the selectivity of higher education institutions (*Uchikoshi* 2022), residential segregation of educational groups (*Blau/Schwartz* 1984), and the overlap ("intersection"; *Blau* 1977) between education and other socioeconomic and cultural factors. Some recent proposals for assessing structural constraints regarding mating squeezes have been developed for Germany (*Eckhard/Stauder* 2019), but have not yet been proposed in other contexts. In order to disentangle the relevance of preferences from structural constraints (mating squeeze), looking at dynamics over the life-course is indispensable (*Eckhard et al.* 2015). Partnership formation criteria and

their consequences may depend crucially on life course stages and previous experiences (*Corti/Scherer* 2021; *Oppenheimer* 1994; *Van Bavel* 2021). However, most studies of assortative mating are static in nature, based on cross-sectional data, or concerned with documenting trends in assortative mating over time, ignoring the temporal dynamics over individuals' life-courses (*Blossfeld* 2009). While this may be appropriate when traditional and standardised life courses prevail (*Brückner/Mayer* 2005), patterns of family formation have become more complex for more recent cohorts (*Kalmijn et al.* 2019; *Thomson* 2014; *Van Winkle* 2018), making a longitudinal perspective essential. In addition, it would be important to examine the extent to which couples become more similar over the life course through imitation, similar lifestyles, and shared environments (*Versluys et al.* 2021). We therefore hope to see more *life course research* on educational homogamy in the future.

New opportunities to study micro-level processes of how individuals search for mates, what characteristics they look for, and how they interact with potential partners may also emerge given new data from online dating (*Skopek* 2023). The emergence of *dating websites and apps* has radically changed how people find partners in recent years (*Rosenfeld* 2018). For example, recent studies in the U.S. and Switzerland show that online dating has become an increasingly more common way to find a partner (*Rosenfeld et al.* 2019; *Potarca* 2020). In Switzerland, it is mainly dating apps that dominate (*Potarca* 2020). These changes in opportunities for meeting a partner may have implications for changes in homogamy patterns and their consequences. For example, a pressing question for sociologists and demographers is whether online dating has increased or decreased assortative mating. This is still an under-researched topic, and more studies are needed in the future (*Lichter/Qian* 2019). On the one hand, it can be argued that online dating allows individuals to choose more effectively according to their preference for similarity (*Kalmijn* 1998). On the other hand, online dating offers a larger pool of potential partners with different socioeconomic characteristics (*Schwartz* 2013; the "romantic love hypothesis" of *Smits et al.* 1998). For example, empirical studies for Germany and Italy show that individuals prefer similarly educated partners in online dating (*Arosio* 2022; *Skopek et al.* 2009, 2011). Other studies for the U.S. and Germany demonstrate that educational homogamy is lower via online platforms than via other intermediaries such as schools and friends (*Potarca* 2017; *Thomas* 2020). As the search processes and interaction behaviour of individuals in online dating are (often) collected and tracked without the user's awareness, these data offer new opportunities to investigate mechanisms of assortative mating (*Skopek* 2023). However, a major drawback (besides the general "big data" issues such as representativeness) is that online dating data is private and generally kept under lock and key by the providers, making it difficult for social scientists to gain access to this data (*Lichter/Qian* 2019; *Skopek* 2023). In the future, increased and trusted collaboration between platform operators and researchers is needed to gain access to this valuable data on homogamy (*Skopek* 2023).

As we argued above, research on the consequences of educational pairing is still scarce, and we are only beginning to understand the contextual circumstances, such as normative settings, under which the consequences of particular pairings

change. Normative (dis-)approval by third parties is usually cited as an explanation for the changing consequences of hypogamy, which seems to have lost its stability penalty for recent cohorts. However, there is also evidence that individuals who form hypogamous unions are (less so today) negatively selected on some other dimensions, such as age or earnings (*Chudnovskaya/Kashyap* 2020; *Qian* 2017), suggesting that focusing on one trait is too reductive. Considering the *combination of various traits*, such as education, occupation, age, or ethnic homo-/heterogamy, is extremely rare in the literature but would be crucial for understanding the mechanisms at play. Whether and how different traits are traded off against each other is a classic interest of sociological research (*Voland/Engel* 1990). Examples include richer men finding younger and more beautiful wives, lower educated men being more likely to mate women with a migration background than other education groups (*Vignoli et al.* 2017), or racial intermarriages coming with status exchange (*Xie/Dong* 2021). However, this evidence has not often made its way into this research stream. The presence of important trade-offs could also mean that heterogamy on one trait increases homogamy on another trait. For instance, by "marrying up," some women have managed to update on other dimensions, which in turn may lead to greater socioeconomic homogamy between partners (*Lichter/Qian* 2019: 306). We hope to see more studies that simultaneously consider different dimensions of homogamy (education, occupation, age, etc.), to explore mating dynamics and the consequences of homogamy.

Most research on couple formation and stability takes a very traditional view of families, focusing mainly on heterosexual marriages. However, in all contexts, *cohabitation* without marriage has increased substantially, and children are often born out of wedlock. Marriage, in turn, may have become more selective, leading to a partial view of the consequences of educational pairing. *Mazzeo et al.* (2024) include some controls for cohabitation and show that the results do not depend on a change in the selectivity into marriage. In the 21st century, in many societies, marriage (and family formation) is no longer restricted to heterosexual couples, raising questions about the mechanisms and functioning of different types of families. Future research will also need to pay more attention to *same-sex couples,* a category that is not easy to study with commonly available data (*Lichter/Qian* 2019: 315; *Schwartz* 2013; *Van Bavel* 2021), although single studies make relevant contributions (see *Ciscato et al.* (2020) for a recent example). Changing partnership relationships, men's and women's educational and occupational choices, and educational and labour market institutions call for continued scholarly attention to intermarriage patterns and their consequences.

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Appendix

We used the following search algorithms for our WoS advanced literature search on the three consequences of educational homogamy, where TS stands for the search topic, PY for the publication year and DT for document type. The AND and OR options are Boolean operators.

For fertility:

- TS= (Homogamy AND Fertility) AND PY=(1980-2023) AND DT= Article
- TS= (Assortative Mating AND Fertility) AND PY=(1980-2023) AND DT= Article

For separation and divorce:

- TS= (Homogamy AND Divorce) AND PY=(1980-2023) AND DT= Article
- TS= (Assortative Mating AND divorce OR Assortative mating AND separation) AND PY=(1980-2023) AND DT= Article
- TS= (Homogamy AND Separation) AND PY=(1980-2023) AND DT= Article

For the intergenerational transmission of educational inequality:

- TS= (Homogamy AND children's education) AND PY=(1980-2023) AND DT= Article
- TS= (Homogamy AND children's educational achievement) AND PY=(1980-2023) AND DT= Article
- TS= (Homogamy AND educational reproduction) AND PY=(1980-2023) AND DT= Article
- TS= (Assortative Mating AND educational inequality) AND PY=(1980-2023) AND DT= Article
- TS= (Parental homogamy AND education) AND PY=(1980-2023) AND DT= Article
- TS= (Parental assortative mating AND education) AND PY=(1980-2023) AND DT= Article

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