RESEARCH HANDBOOK ON
Partnering across the Life Course

Edited by
DIMITRI MORTELMANS • LAURA BERNARDI
BRIENNA PERELLI-HARRIS



RESEARCH HANDBOOKS IN SOCIOLOGY

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Research Handbook on Partnering across the Life Course

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Contents

List of contributors viii

1 Introduction to *Research Handbook on Partnering across the Life Course* 1
Dimitri Mortelmans, Laura Bernardi and Brienna Perelli-Harris

PART I THEORETICAL PERSPECTIVES ON PARTNERSHIP

2 Historical perspectives on partnering 14
Rebecca Probert

3 Anthropological perspectives on partnering 24
Julia Pauli

4 Sociological perspectives on partnerships 38
Brienna Perelli-Harris and Sharon Sassler

5 Psychological perspectives on partnering 50
Esther Kluwer and Tea Trillingsgaard

PART II PARTNERSHIP DIVERSITY

6 Married and cohabiting partnerships 64
Nicole Hiekel

7 Arranged marriage 76
Keera Allendorf

8 LGBTQ+ partnerships 89
Isabeau Van Acker, Chao Song, Els Elaut and Alexis Dewaele

9 Living apart together 102
Arnaud Régnier-Loilier

10 Polyamory 117
Tonina Liriel Aurel and Cornelia Schadler

11 Being single in the twenty-first century 129
Elyakim Kislev

PART III PARTNERSHIPS ACROSS THE LIFE COURSE

12 Dating and online partnership formation 141
Gina Potarca

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13 Re-partnering across the life course 153
Katya Ivanova

14 Partnerships in later life 165
Pearl A. Dykstra

15 Widowhood and grey divorce 178
Michaela Kreyenfeld and Sarah Schmauk

PART IV CORRELATES AND CONSEQUENCES OF PARTNERSHIPS

16 Parental influences on partner relationships 192
Aart C. Liefbroer

17 Health and partnerships 203
Gerald R. Nowak III and Hui Liu

18 Migration, ethnic diversity, and partnerships 214
Nadja Milewski

19 Biopsychosocial perspectives on close relationships 228
Lane Beckes

PART V PROCESSES INSIDE PARTNERSHIPS

20 Money, work, and wealth in partnerships 241
Nicole Kapelle

21 The partnership context of childbearing 254
Júlia Mikolai

22 Relationship quality 265
Jeremy B. Kanter, Susan Sprecher and Terri Orbuch

PART VI PARTNERSHIPS WITHIN SOCIETIES

23 Social stratification and partnerships 279
Diederik Boertien

24 The economy and partnerships 291
Daniele Vignoli and Raffaele Guetto

PART VII PARTNERSHIPS AROUND THE WORLD

25 Partnering in Africa 304
Oluwaseyi Dolapo Somefun, Boladé Hamed Banougnin, Kirsten Stoebenau and Emily Smith-Greenaway

26 Partnering in the Middle East and North Africa 316
Mohammad Jalal Abbasi-Shavazi and Meimanat Hosseini-Chavoshi

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27 Partnering in East Asia 332
Yen-hsin Alice Cheng and Chen-Hao Hsu

28 Partnering in Latin America 347
Pilar Wiegand-Cruz

Index 365

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1. Introduction to *Research Handbook on Partnering across the Life Course*

Dimitri Mortelmans, Laura Bernardi and Brienna Perelli-Harris

Cleopatra and Marcus Antonius, Romeo and Juliet, Franklin D. and Eleanor Roosevelt. History has had its share of famous couples. Music history has produced countless tributes to loved ones (and probably twice as many to heartbreak). Partnerships are at the heart of everyone's everyday life. Yet we seem to know less about them than we do about subatomic particles. One thing we do know is that both partnerships and particles are mysterious entities whose behaviour and interactions are difficult to predict.

This volume is a *Research Handbook on Partnering across the Life Course*. It brings together scientific insights, both empirical and theoretical, on partnerships around the globe. In doing so, we go beyond the general story of the recent and largely documented demographic accounts of union dynamics (Sobotka and Toulemon, 2008). Such an account reads as follows: in the late 1960s, demographic behaviour started to shift as people started to marry later and postponed childbearing (Billari and Liefbroer, 2010). Couples also had fewer children than before, leading to below replacement fertility in many countries (Billari et al., 2007; Frejka and Sobotka, 2008). At the same time, divorce rates began to rise to unprecedented levels (Mortelmans, 2020; Wagner, 2020). The next step was the slow reduction of marriage, the rise of unmarried cohabitation and the subsequent rise in out-of-wedlock births (Kiernan, 2001; Perelli-Harris and Lyons-Amos, 2015) and more recently the increase in union dissolution, repartnering and LAT relationships (Thomson, 2014). However, at the same time, partnership, whatever its form, remains a highly desired status among men and women (Smart and Shipman, 2004; Bergström and Moulin, 2022).

The consequences of these developments are what we have called the family kaleidoscope (Mortelmans et al., 2016). The word 'kaleidoscope' comes from the Greek words *kalos* (beauty), eidos (form) and *skopos* (to examine). The kaleidoscope looks, therefore, at the beauty of different forms. This colourful lens is what we need to provide a comprehensive landscape of partnership diversity. This *Research Handbook* aims to go beyond a classic review of the state of the art of academic knowledge. When starting this book project, we, the editors, chose an interdisciplinary approach that goes beyond (Western) high-income countries. We have brought together the world's expertise on arranged partnerships, young starters and life-long unions, online dating, and LGBTQ relationships, to name just a few. Although we are unable to capture the true complexity of the world's families, we have aimed to include contexts often missing from such compendia, for example, the Middle Eastern and African families. Only such a broad range of experts can provide a glimpse of the plethora of perspectives that the partner kaleidoscope offers.

The concept of *partnership* does not have a strict and uniform definition but depends on time, context, family linkages, and individual proclivities. The kaleidoscopic lens that is adopted to view partnerships differs dramatically between disciplines and even between

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researchers within disciplines. This *Research Handbook* grapples with these different perspectives, providing an interdisciplinary view across psychology, bio-evolution, history, anthropology, sociology, and demography. By contrasting and synthesising these perspectives, we gain a holistic picture of the definition and role of society partnerships today.

1.1 DEFINING PARTNERSHIP

This *Research Handbook* is about partnerships, couples, and romantic relationships between two or more people, but also about the breakdown of partnerships, the loss of a partner, and remaining single. Historically, partnerships have been embedded in the social and economic structure of society, a key way to organise families and kin. For millennia, the social institution of marriage has governed the relations between two individuals, and in most of the world continues to do so (see Pauli, Chapter 3). Thus, partnerships cannot be seen solely as a relationship between two individuals, but as a link that binds familial networks and households, and a way to regulate wealth, transfers, inheritances, and welfare.

Nonetheless, as societies have changed, so has the role of partnerships. Increasingly, heterosexual marriage no longer defines partnerships but is instead one partnership form among many. Relationships have become fluid and more likely to end. Singlehood and same-sex partnerships have become recognised and acceptable options, at least in some parts of the world. As these trends continue to increase globally, it becomes imperative to consider not only spouses whose relationships are officially recognised through law, but also alternative arrangements, agreements, and associations. However, this makes defining a partnership even more difficult. We decided to begin our journey by attempting to define partnerships. First, we examine one of the most basic features that in many contexts identify personal relationship(s) and partnerships – love and commitment.

1.1.1 Defining Partnerships through Love and Commitment

A starting point can be found in social psychology. It was only in the 1970s that psychology began to take an academic interest in emotions and the concept of love (see Kluwer and Trillingsgaard, Chapter 5). Hatfield and Sprecher (1986) were among the first to formulate a theoretical basis for the concept of love, distinguishing between passionate and companionate love. Companionate love is a friendly affection and deep attachment to someone, whereas passionate love is defined as a state of intense longing for union with another (Hatfield and Walster, 1978). Later, Sternberg (1986) developed the triangular theory of love[1] in which love is a construct consisting of three dimensions (metaphorically represented as the vertices of a triangle): intimacy, passion and commitment. The intimacy dimension refers to feelings of closeness, connectedness, and bondedness – like companionship. Passion relates to the sexual dimension of a relationship and physical attraction. Finally, the commitment dimension refers to the desire to stay with someone and to commit to that person in the future (Sternberg, 2006).

Commitment is one of the grounds of a partnership that developed into a full-blown research area. It is defined as the intention of couples to remain in their relationship over time (Stanley et al., 2010).

Two main theories have developed a complementary framework on why partners develop a long-term relationship: *interdependence theory* (Kelley and Thibaut, 1978) and *social*

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exchange theory (Levinger, 1965). Both theories identify three forces that keep relationships together: personal (the desire to stay in the relationship), moral (one's values and beliefs), and structural (the attractiveness of the relationship; the costs of breaking up; and the inverse relation between the attractiveness of the relationship and the cost of the alternative (being single or entering another relationship)) (Johnson et al., 1999). These dimensions of commitment determine relationship quality as elaborated on in Kanter et al., Chapter 22.

The commitment dimension points to the shared path that two (or more) partners walk to invest in the long-term survival of the partnership. Aside from commitment, also *intimacy* within couples has received a lot of (empirical) attention. Here the emphasis lies on the individual in a relationship having feelings of closeness, connectedness, and bondedness. Jamieson (2011), paraphrasing Morgan's concept of *doing family*, prefers the term 'intimacy practices' or 'disclosing intimacy' transforming the static concept of intimacy into a continuously negotiated and renewed process between partners.

In sum, a romantic partnership is a multidimensional concept based on a combination of intimacy, passion and commitment that are constantly negotiated between two or more partners (more in Beckes, Chapter 19). Most of the chapters in this *Research Handbook* assume a dyad when discussing partnerships.

1.1.2 Defining Partnerships through Institutions and Living Arrangements

Although love, intimacy, and commitment may be a key way of defining partnerships, this definition does not always line up with the official form of partnership – marriage – which has dominated living arrangements across the globe for centuries. Marriage has been the primary means for states and religious institutions to regulate families, manage property and inheritance, tax households, provide welfare and protection, and ensure the maintenance of religious values (Coontz, 2005) (see Probert, Chapter 2). Although alternative partnership arrangements have been increasing, marriage is still the only state-recognised legal bond between two individuals, except in a few European countries (Perelli-Harris and Sanchez Gassen, 2012). Note that over the past few decades, the right to marry has been extended to same-sex couples in more and more countries. Marriage is also the only relationship which is officially registered (except civil partnerships in some countries, e.g. France, the Netherlands). Marriage tends to have a defined starting date, on the day of registration, and a legal end after the divorce process is over. Hence, marriage is the only form of partnership widely available in official statistics.

Today, couples in high-income countries usually enter legal marriage to signify their love and commitment, or potentially to gain rights and benefits only available to married couples (Perelli-Harris et al., 2014). Thus, marriage often overlaps with the psychological concept of partnership discussed above. However, in many contexts, the decision to marry is not made exclusively by the couple, but instead it is strongly influenced by families. In many African countries, marriage is an arrangement between kin networks, often formalised with an exchange of bride wealth that could include livestock, household items, or money (see Somefun et al., Chapter 25). In much of India and South Asia, marriages are solely arranged by parents or other senior family members with little or no input from the couple (see Allendorf, Chapter 7). In parts of the Middle East, especially in Muslim countries, consanguineous marriage, or marriage between cousins, continues to be common (see Abbasi-Shavazi and

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Hosseini-Chavoshi, Chapter 26). Thus, it is important to keep in mind that for billions of people, the choice of partnership is still not completely voluntary.

Nonetheless, although traditional marriage has been maintained throughout much of the world, many regions have experienced a decline in marriage, with non-marital cohabitation becoming more and more popular. In Europe and North America, marriage rates have declined dramatically, with cohabitation becoming the normative route to starting partnerships in most countries (see Hiekel, Chapter 6). Childbearing within cohabitation has become common throughout Europe (see Mikolai, Chapter 21) and Latin America (see Wiegand-Cruz, Chapter 28). In East Asia, the prevalence of cohabitation has also been rising steadily in Taiwan, Japan, and China, although cohabiting couples rarely have children (see Cheng and Hsu, Chapter 27).

Cohabitation is more difficult to define than marriage, as the process of moving in together is often gradual, without a clear or remembered starting or ending date. The meaning of cohabitation is also ambiguous, since the level of commitment varies across couples and over time within relationships. Couples often first live together to test whether their relationship is solid enough for marriage. Sometimes their living arrangement is a matter of convenience, and they have little intention to ever marry. In other cases, their commitment is strong, but they simply never get around to marrying, due to other, often financial, priorities. Couples may also reject the institution of marriage altogether, living in a long-term relationship indistinguishable from marriage (see Perelli-Harris and Sassler, Chapter 4). Thus, while cohabitation is now more often included in surveys and registers, this partnership type can still be difficult to define, measure, and examine.

1.1.3 Flexibility in the Definition of Partnerships

As social norms and values have shifted, particularly in high-income countries, the concept of a single, life-long, monogamous partnership has become less normative. The rise of individualisation has transformed interpersonal relationships, leading to an increase in relationship churning. With a focus on self-actualisation, individuals are more likely to leave an unsatisfactory relationship to pursue their next romance (see Perelli-Harris and Sassler, Chapter 4). Online dating has made it even easier to seek new relationships outside of one's immediate personal networks (see Potarca, Chapter 12). Thus, when marriages break down, or cohabiting partners separate (see Kreyenfeld and Schmauk, Chapter 15), individuals often seek new partners, leading to repartnering (see Ivanova, Chapter 13).

Another new development has been the increase in Living Apart Together (LAT) relationships (see Régnier-Loilier, Chapter 9). Although any new relationship starts with partners living separately, the rise of LATs refers to the emergence of long-term, committed partnerships in which partners choose to live apart or cannot move in together due to various constraints. LATs are becoming more common in young adulthood, when partners may live in separate locations for employment reasons, but also in later life, often after divorce or widowhood. At older ages, couples may want to live on their own to maintain independence or avoid conflict with children from previous relationships (see Dykstra, Chapter 14). Again, with the increase in individualisation and both men and women pursuing careers, LATs are becoming an alternative to traditional marriage arrangements.

New configurations raise even more questions about the definition of partnership, especially concerning sex and intimacy. Short-term 'hook-ups', serial and concurrent partnerships, and uncertain living arrangements raise questions about when couples consider themselves to be

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in a relationship. The answer to the commitment question depends on which partner is asked and how the relationship develops over time. In addition, the recognition and acceptance of LGBTQ+ relationships have broadened the possibilities even further. Gender diversity and sexual questioning raise unique challenges in understanding such partnerships, especially since hetero- and cisnormative societal expectations still prevail (see Van Acker et al., Chapter 8). Polyamorous relationships fundamentally challenge the concept of the couple as a dyad. Although rare, these relationships defy any definition; for example, they can be a married heterosexual couple with secondary relationships, a triad in a long-term relationship, or an intimate group of all genders (see Aurel and Schadler, Chapter 10). This is when the kaleidoscope becomes even more necessary to view the plethora of partnership types.

Finally, it is important to acknowledge that along with the increasing diversity of partnerships, the tendency to be partnerless has also increased. The trend in living alone has become a world-wide phenomenon, partially due to the postponement of partnership formation in the earlier part of the life course, and remaining single after widowhood and divorce, but also because singlehood is becoming more of a lifestyle choice (see Kislev, Chapter 11). No longer a taboo, and increasingly accepted, remaining single is now being embraced by a larger minority. Thus, although finding a partner is still the aim for most individuals in most societies, some are now recognising that they are just as happy being on their own.

1.2 PARTNERSHIPS ACROSS THE LIFE COURSE

A second key principle of this *Research Handbook* is that the kaleidoscope of partnerships can change over time and depending on context. At the individual level, it is a biographical process, with people potentially moving in and out of partnerships of various kinds as they age. At the level of each partnership, it is a process of reciprocal adjustment, in which each person's role changes and commitment can wax and wane. At the societal level, it is a process through which the prevalence of partnership forms as well as their social and legal recognition, and the expectations attached to them vary.

As for all processes, individual time is a key dimension in the study of partnership. This is why, underlying this *Research Handbook* and the choice of its sections, we employ a life course perspective. The notion of biographical time is central to the life course research tradition. Developed in the social sciences in the 1960s, life course research became a major step in the study of human development (Elder, 2008). By examining the unfolding of events and transitions over the life course, we gain insights into the developmental trajectories of individuals and couples. This long-term view is essential for capturing the complexities of relationship dynamics, allowing for a nuanced understanding of how experiences at different life stages shape and influence the quality and trajectory of a couple's relationship. The multidimensional and longitudinal approach of the life course and their interdependencies (Bernardi et al., 2019), despite its complexity, offers an important interdisciplinary theoretical frame for the study of partnership.

1.2.1 Partnership Trajectories and Timing

First, a life course perspective facilitates an exploration of the link *between individual life trajectories and the dynamics of a partner's relationship as well as the timing of events*

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such as childbearing, buying a home, and retirement. The unique life histories, experiences, and expectations with which an individual enters an intimate relationship, and the interplay between these and their partners' shared experiences is what makes their partnership biography. An individual relational trajectory is made of the sequence of relationships, including partnerships, for a long time. This is where the study of union formations and dissolutions as well as their causes and consequences inform us about partnerships as individuals age.

The increasing dynamics in union trajectories have brought new attention to re-partnering (or entering a higher-order partnership after a divorce or separation). Repartnering has consequences for the socio-economic well-being of the adults and children involved, for changing the meaning of biological and social intergenerational ties, and for fertility behaviour (see Ivanova, Chapter 13). Repartnering is a rich empirical example of the principle of linked lives in the life course paradigm, for which the trajectory of one individual (in this case the partnership trajectory) produces cross-over effects on that of related others) and spill-over effects on other life domains (economic well-being and fertility).

This volume also addresses the increasing phenomena of digital partners' market and repartnering. Online partnership formation has attracted attention to the potential consequences on the partners' market and their family behaviour. Compared to non-digital spaces of mate selection, online partner markets seem to have decreased social homogamy, produced unions with more similar gender roles, and somewhat reduced age at marriage in some contexts (see Potarca, Chapter 12).

1.2.2 Spillover and Crossover Mechanisms

The life course perspective also *points to the interdependencies between partnership and other life domains* like migration, education, childbearing, employment, and health. Migration and partnership trajectories are interrelated even when migration occurs in the parents' generation. The role of socialisation in a family with different origins, and family members' influences throughout youth and young adulthood, partially explain the relatively low rate of mixed partnerships (between individuals with a migration background and those without it, see Milewski, Chapter 18). Partnership and education also are strongly intertwined: strong evidence indicates that partnering dynamics are still largely socially stratified, by educational level and earnings, potentially due to opportunities on the marriage market, individual preferences matching, or social norms favouring status homogamy (see Boertien, Chapter 23). Last, but not least, are positive spill-overs between being in a partner relationship and mental as well as physical health. While historically this was evident for married partnerships, more recently, with the growing acceptance of cohabitation and same-sex partnerships, comparable spill-over effects are observed in these partnership types as well. This indicates that the social recognition of a form of partnership largely conditions its effect on health (Nowak and Liu, Chapter 17).

Just like individuals, each partnership is embedded in a wider relational context which necessarily exerts direct and indirect influences on the partnership. Among the closest and most durable relational contexts is the partner's own family and, in particular, parents. By passing on genes, socialisation, and defining educational opportunities, as well as supporting young adult children, parents influence their children's partnership in various ways. In Chapter 16 (Liefbroer) three mechanisms are discussed: active value socialisation, role modelling, and both positive and negative social and material support. These mechanisms function with

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different degrees of strength depending on the relational quality between parents and children over time and the family structure.

Understanding how early life experiences, such as childhood attachment patterns or family-of-origin dynamics, influence adult romantic relationships provides valuable insights into the origins of certain relational patterns and challenges. The experience of norms and practices at younger ages seems to be influential on later partnership behaviour and preferences. For instance, when we look at the relationship between partnership and childbearing, evidence shows that growing up with half-siblings raises the probability of experiencing multi-partner fertility (see Mikolai, Chapter 21). Similarly, the division of labour and the gender roles observed in partnerships, particularly within marriages with children, are related to internalised social norms around the nurturing role of women and the role of men as the economic providers (see Kapelle, Chapter 20).

1.2.3 Relational Development

By providing material support, companionship, and guidance, as well as emotional bonding, intimate relationships contribute to healthy ageing, despite the increasing diversity of older adults' biographies (see Dykstra, Chapter 14). The extent to which people benefit from having a partner depends on the quality of their unions. High-quality relationships regulate emotions and favour stress management during life challenges. Yet, unsupportive, or uncertain relationships heighten stress and endanger well-being and health. This is where we enter the research field of life-long relationship development research. The theory of physiological regulation that distinguishes the physiological production of good and bad stresses is useful for understanding how partnership affects well-being. Provided that relationship quality is crucial for health, what makes a relationship of quality? The numerous scales used in the literature refer to the partner's assessment of both broad concepts (e.g. having a good relationship) as well as more specific aspects of the relationship (e.g. satisfaction about various life domains or agreement on various topics). Over time, despite some stability of initial quality levels, observed changes in relational quality can reflect changes in coping with life challenges. While individual partners' attributes and, to a certain extent, their cognitions, attitudes, and perspectives are associated with relational quality, key factors are relational characteristics like communication, sexual intimacy and emotional work as well as partners' embedment into a larger social network (see Kanter et al., Chapter 22).

The comparison of grey divorce and widowhood above the age of 50 shows interesting variation in relational quality in mid- and late adulthood ages according to the cause of partnership dissolution. For instance, unlike widowhood, separation and divorce are preceded by some degree of conflict or at least low-quality relationships. In addition, they are also more commonly anticipated and often the result of a decision initiated by at least one, if not two, partners (see Kreyenfeld and Schmauk, Chapter 15).

1.2.4 Historical and Geographical Context

Finally, partnerships develop across historical time and cohorts. When taking a cohort approach to partnerships, we can see that each new cohort enters its relationship pathways differently, with different perspectives and practices. The life course perspective considers the impact of social, cultural, and historical contexts on couple relationships. Societal norms,

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economic conditions, and cultural expectations can shape the opportunities and constraints that partners face at different points in their lives. The meaning and the forms of partnerships evolve historically as the social and legal context in which romantic relationships are formed and dissolved changes, as well as the larger family ties in which they are embedded.

In historical Europe, given the legal and normative context, the study of partnership is usually confined to the study of marriage (and remarriage of widows), the changing age of marriage, and the gradual liberalisation of divorce and remarriage. Informal – and at the time 'illegal' – intimate relationships were not documented in a way that can be systematically studied at the population level (see Probert, Chapter 2). As ideational change occurred hand in hand with the increasing economic and legal independence of women, unmarried cohabitation acquired a new status in the Western world and diffused widely as a precursor or an alternative to marriage. Consequently, research on unmarried unions and married cohabitation are examined together (see Hiekel, Chapter 6).

Besides the normative and legal context, objective and perceived economic conditions affect partnership trajectories (Chapter 24, Vignoli and Guetto). Individual employment and financial conditions still largely affect an individual's probability of entering a partnership in the Western world. However, when economic insecurity is contextual, union formation may be delayed or forgone, particularly so by the most vulnerable populations. In addition, in less egalitarian gender regimes, men are more affected than women by economic uncertainty.

Last, cultural expectations and values are important dimensions affecting partnership form, dynamics, and consequences. Rising personal preferences for freedom and flexibility in an age of post-materialism (Lesthaeghe, 2010; Van de Kaa, 1994) are associated with trends in voluntary singlehood and LAT partnerships, as well as how unpartnered adults are perceived. The revalorisation of singlehood, in turn, affects singles' social relations, sexuality, and ultimately their well-being (see Van Acker et al., Chapter 8 and Kislev, Chapter 11). Similarly, a life course perspective that embeds individual trajectories in their relational and socio-cultural context is key to understanding the changing face of LGBTQ+ partnerships. LGBTQ+ relationships and individual partners within them face the challenging task of redefining their sexual intimacy and engaging in positive dyadic coping to avoid stress spill-overs related to their minority status (see Van Acker et al., Chapter 8). Polyamory relationships (consensual non-monogamous relationships) participate in the redefinition of intimacy in former marriage-based societies. Despite the fact that these forms have existed under different names in different times and places (communities, open marriages, polygamy), the current debate on their definition shows that there is a new need for legitimisation. In the global north such legitimisation needs to be constructed around the level of intimacy experienced on the one hand and, on the other hand, around the valorisation of consensus, integrity, honesty, appreciation, self-knowledge, and self-control.

1.3 CONCLUSION

And just as one single volume is not able to bring you all the knowledge about subatomic particles, so we cannot bring all dimensions and insights on the partnership kaleidoscope.

One limitation of this *Research Handbook* is its inevitably incomplete geographical and historical coverage. Despite including chapters on partnerships in non-western areas of the world such as Latin America, East Asia, the Middle East and Africa, we could only provide

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a general overview of their major features. Coverage of all regions across the globe would entail a volume in its own and would still miss cultural nuances. However, the regions we do cover at least provide a glimpse of different cultural and structural aspects of the family kaleidoscope.

This *Research Handbook* also does not exhaustively cover legal regulations around intimate relationships. Relationship dynamics and norms are inextricably shaped by legal regulations and partners' obligations and rights towards each other and their offspring. Laws vary in time and space and define the domain of possible and legitimate relationships. Laws change under social pressure or anticipate and stimulate change in a dynamic and sometimes tense relationship. But legal arrangements also go beyond the mere defining aspect of relationships. Laws regulate how property is shared or divided and the rights of children vis-à-vis their parents. In our increasingly globalised world, international relationships face additional complexities as different countries' laws may conflict, particularly in matters of divorce, child custody, and citizenship. On a global scale, from a human rights perspective, there is an increasing awareness that family law should not discriminate based on gender or sexual orientation, and that it should promote equality and respect for individual rights.

We are also aware that our *Research Handbook* does not directly address rapidly changing partnership dynamics in adolescence and emerging adulthood. The age difference that separates experts from the lived experiences, cultural contexts, and societal norms of younger generations undoubtedly impacts our understanding and interpretation. Some studies have indicated that young people are having less sex than previously (Burghardt et al., 2020; South and Lei, 2021; Twenge et al., 2017; Wellings et al., 2019), and indeed relationships seem to be starting and persisting through texting rather than 'in real life'. Young adults' relationships with each other may have fundamentally shifted because of Covid isolation, social media, and online lives.

On a related note, we have no chapter that explicitly defines relationships only through sexual intimacy and hook-ups. Our focus has primarily been on partnerships defined by love and commitment, or, alternatively, institutions and social structures. However, sexual intimacy is very important for relationships and may even be at the core of most. Yet as social mores have relaxed, sex can occur outside of a long-term committed partnership and have very little to do with love and romance, again challenging the definition of partnership. Thus, the role of sex remains unclear in a Venn diagram of partnerships which only focuses on love and commitment, institutions, and living arrangements.

The same applies to virtual relationships. The 2013 movie 'Her', directed by Jonze (2013), brings the story of Theodore Twombly, a sensitive and introverted writer, who purchased an advanced artificial intelligence operating system designed to adapt and evolve like a human being. The AI, Samantha, evolves in the film from a helpful assistant to a close friend and eventually Theodore's romantic interest. Their relationship grows deeper and more intimate, challenging Theodore's notions of love and connection. What was science fiction in 2013, might be slowly becoming reality with the 2023 release of Large Language Models like ChatGPT (OpenAi, 2023). In this *Research Handbook*, we consider partnerships to be human based. But younger generations already show that you can have 'texting relationships', long before you meet your partner in real life (Sharabi et al., 2019). And even though today these virtual relationships are still between two humans, our current-day theories may be challenged tomorrow when people are bonding with virtual AI-systems.

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When viewing the future of partnerships within an ever-evolving society, the editors of this *Research Handbook* see a field of study that is not only rapidly evolving but also at an academic crossroads. The dynamic nature of partnerships raises critical questions about classification and the methodologies currently employed. As human (and maybe non-human) partnerships transform at an unseen pace, influenced by technological advances and cultural transformations, our field is subject to both challenges and opportunities in data collection and analysis. Will relationships still be classifiable? What type of data will we need to unravel the details of the family kaleidoscope?

The role of the State in supporting these evolving forms of partnerships, each with its unique characteristics and needs, is a journey where social scientists from multiple disciplines will need to collaborate. In the legal sphere, the question of whether and how the law should adapt to the fluid nature of relationships is paramount. The traditional legal frameworks governing partnerships are being tested by the emergence of relationship forms never seen before, raising the question of whether laws should differentiate based on the nature of partnerships or the individuals within them. The protection of partnership diversity also relies on the terminology used to address the heterogeneity of future relationships. Already today, we often lack words to describe family relationships in blended families, reminding us of the power of language to define and 'label' relationships. Yet the language that describes the lived experiences of partnerships will shape broader societal perceptions and policy approaches. One of the major instruments of data collection for sociological inquiries, the survey, will face further challenges measuring 'a partnership', given the fluidity of lived experiences. While adolescents define their (sexual) relationship as 'talking', surveys still ask 'for the last three months, did you have a stable romantic relationship?'. In the academic pursuit of understanding partnerships, their rapid transformation is akin to the elusive behaviour of particles in high-energy physics. Just as you can only grasp particles through high tech instruments, you can only grasp the multi-faceted nature of partnerships with complex datasets. Our goal with this *Research Handbook* is to bring you a spectrum of these state-of-the art views, varied and vibrant from the inner beauty of the family kaleidoscope. While our exploration does not present a final, or a perfect picture, it certainly will give an insight on current and evolving dynamics of human bonding.

NOTE

1. Similar theoretical models are also developed in the attachment theoretical framework. For an overview, see: Berscheid (2010); Sternberg and Weis (2006) and Kluwer and Trillingsgaard, Chapter 5.

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PART I

THEORETICAL PERSPECTIVES ON PARTNERSHIP

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2. Historical perspectives on partnering

Rebecca Probert

This chapter provides an historical perspective on European partnering practices from 1750 to the 1960s. Using England and Wales as a case study, it will show the centrality of marriage as the key partnering practice throughout the period.

'Partnering' here is taken to refer to a stable, sexual, co-residential relationship rather than either sexual encounters (whether or not they produced children) that did not involve the parties sharing a home or platonic home-sharing arrangements. As the first section will show, formal marriage was the dominant form of partnering, with unmarried cohabitation being rare. As a result, in order to understand partnering practices across the life course it is necessary to look at when couples married, how long marriages lasted, and the likelihood of remarriage following death or divorce. The second section of the chapter accordingly charts the changing norms about the age at which it was appropriate for individuals to marry, reviewing both the legal rules on the minimum age at marriage and the factors that affected the timing at which couples married. The third considers the duration of marriages and the likelihood of repartnering after the death of a spouse, and the final section assesses the extent to which individuals were expected to have one partner for life, and how the gradual liberalisation of divorce law was driven by the desire to facilitate remarriage.

2.1 FORMALISING MARRIAGE

In broad terms, formal marriage was the norm across Europe throughout the period, in that the vast majority of couples who set up home together had gone through a legally recognised form of marriage. Yet exactly what was required for a 'formal' marriage changed during this time, with the authority to set the rules shifting from religious authorities to the state (Probert, 2020). As this section will show, where marriage had previously been under the control of a single religious authority, this shift was at times facilitative, for example in providing a neutral option for couples of different faiths or enabling a wider range of religious groups to conduct legally recognised weddings. In other cases, however, the shift of authority to the state was restrictive, with the state requiring all couples to go through a civil ceremony in order for their union to be recognised. As a result, in any given jurisdiction, the percentage of couples who were formally married depended on how far the rules governing formal marriage aligned with perceptions of how marriages should be conducted, and the relative importance attached to legal recognition as compared to religious validity.

England and Wales provide a good example of the complex interplay between religious and legal requirements in the making of marriage. Here the shift of authority from church to state was a gradual one. In 1750, entry into marriage was still governed by the canon law of the Church of England. Contrary to popular belief, there was no such thing as a 'common-law' marriage: only weddings conducted by an Anglican clergyman were recognised as valid. In practice, the vast majority of couples *were* married by an Anglican clergyman (Probert,

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2009). This conformity can in part be explained by the social and legal importance attached to a formal marriage: eighteenth-century cohabitants were 'fornicators' to be punished by the church courts and their children bore the stigma of illegitimacy (Probert, 2012). It can also be explained by the religious homogeneity of mid-eighteenth-century England and Wales. Protestant dissenters accounted for around 6 per cent of the population and had not developed their own marriage practices. The main exception to this was the Society of Friends, which had developed its own distinctively simple ceremony in the late seventeenth century. The Catholic population was much smaller, at around 1 per cent: while they preferred to be married by their own priests, many went through an additional Anglican ceremony to ensure that their marriage was legally recognised (Probert, 2009). There was, in addition, a tiny Jewish population who were treated as aliens and who married according to their own long-established religious rites.

The passage of the Clandestine Marriages Act in 1753 made it clear that it was now the state that was the ultimate arbiter and guarantor of validity (O'Connell, 2019). However, the Act did not change the substance of what was required for a formal marriage (Probert, 2009). A ceremony conducted according to the rites of the Church of England remained the only means of marrying for which provision was made under the Act. Quakers and Jews were formally exempted, but without any mode of marrying being specified for them. In terms of practice, then, little changed in terms of the likelihood of couples marrying in a formal ceremony.

By the early decades of the nineteenth century, however, it was becoming increasingly untenable to require all weddings to take place within the Church of England. Dissenters such as Unitarians, Baptists, Presbyterians, and Independents still married in the Anglican church but were vocal in their dissatisfaction with the necessity of compulsory conformity in this context when other religious freedoms had been won. In addition, many Irish Catholic immigrants were going through a non-legally binding ceremony before a Catholic priest without an additional Anglican wedding, leading to concerns about women and children being subsequently abandoned and left to depend on the poor law for support. Such issues led to the passage of the Marriage Act 1836. This preserved the privileged position of the Church of England and continued to treat Quaker and Jewish marriages differently; but it also facilitated a wider range of ceremonies being accorded legal recognition by allowing any religious group to register its place of worship for weddings and introducing the possibility of getting married before a civil official in a register office. If it did not quite ensure that every couple could marry in the way that they wanted, it did at least ensure that no one had to be married according to rites to which they objected (Probert, 2021).

Of course, there were always some marriage ceremonies that took place outside these formal structures, whether deliberately or inadvertently. Some Catholic couples continued to enter into religious-only marriages, as did Jewish refugees from eastern Europe in the late nineteenth century and Muslims in the early twentieth century (Probert, 2023). Yet these 'informal' marriages formed a tiny percentage of the total.

Nor was it common for couples to cohabit without going through any ceremony. Claims by earlier generations of historians that as many as 20 per cent of couples may have been cohabiting (Gillis, 1985) have been shown to be baseless (Probert, 2012). While statistics on non-marital cohabitation were not collected until the late twentieth century, inferences can be drawn from the percentage of births that occurred outside marriage. This remained strikingly low across the period. In 1750 under 3 per cent of all births were recorded as illegitimate; by the close of the century this figure had crept up to 5 per cent but in the early years of the nineteenth century it fell again. The mid-nineteenth century saw a sharp increase – to just

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under 7 per cent – between 1835 and 1845, and a slower decrease, but in its final decades the percentage was lower than it had been a hundred years earlier (Wrigley and Schofield, 1981). The First and Second World Wars both resulted in temporary spikes, but even then the figure did not exceed 7 per cent until the 1960s (Office of Population Censuses and Surveys, 1987). Moreover, non-marital parenthood was usually not the result of non-marital partnering, in the sense of a long-term co-residential relationship. Particularly in the eighteenth and nineteenth centuries, it was rare for the parents to be living together: most children born outside marriage grew up without a father in the household (Frost, 2003; 2014). Indeed, in some cases these children did not live with their mother but were absorbed into the households of sympathetic family members or, alternatively, abandoned to institutions (Levene et al., 2005; Probert, 2014; Williams, 2018). Only in the twentieth century did this begin to change, and then only gradually (Probert, 2012). And only in the 1960s did cohabitation begin to emerge on any statistically significant scale (Murphy, 2000).

Such an alignment between marriage law and practice was not always replicated elsewhere across Europe. Some countries adopted a similarly facilitative approach to marriage law reform, with states authorising additional religious groups to conduct legally recognised marriages (Probert, 2020). Sweden, for example, shifted from requiring marriages to be celebrated in the Lutheran church to authorising first other Christian denominations and then Jewish communities (Sörgjerd, 2012). Such authorisation should be distinguished from simply recognising religious ceremonies: as in England and Wales, the state laid down the conditions necessary for recognition. Elsewhere, however, the shift to state control over marriage meant a more restrictive approach, with a civil ceremony alone being recognised. Universal civil marriage was first introduced in France, in the wake of the French Revolution (Desan, 2004). Over the course of the nineteenth century, other European states followed France's lead: Belgium in 1832, the Netherlands in 1838, Italy in 1865, Spain (briefly) in 1870, Switzerland in 1874, Germany in 1875, Bulgaria in 1878, and Hungary in 1894 (Probert, 2024). In these jurisdictions, the change in what was meant by 'formal' marriage in legal terms did not always succeed in changing couples' views as to the form that a marriage *should* take. In both Spain and Italy, many couples continued to marry in a Catholic ceremony despite its lack of legal recognition. In the former the requirement of a civil ceremony was quickly abandoned; in Italy it was retained for longer, but eventually abandoned as a result of the Lateran Pact in 1929 (De Ussel, 1991; Seymour, 2006).

Despite examples of resistance to legal change, formal marriage remained the dominant form of partnering across Europe. It was rare for couples to live together unmarried: '[i]n a society that considered marriage as the only legitimate way of forming a family, those couples who lived together outside of marriage were stigmatized by their neighbours' (Barbagli and Kertzer, 2003, xxx). Again, inferences can be drawn from the relatively low percentage of births outside marriage, at least at the national level. In broad terms the same pattern can be seen of a rise from very low levels in the mid-eighteenth century, a further rise in the nineteenth century, and then a fall in the early years of the twentieth century (Shorter et al., 1971). At a regional level, the differences were even more striking. Yet again, even where non-marital childbearing was common, it was not necessarily linked to cohabitation. Certain parts of Austria, for example, had very high rates of births outside marriage (Shorter et al., 1971). Couples here did not necessarily have the option of getting married: legal restrictions on the marriages of those without property or resources existed until 1867. Yet even after their repeal, economic conditions might still act as a practical barrier to both marriage *and* cohabi-

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tation: Summall's study of the Gurk valley, for example, found that economic strain resulted 'in significant numbers of couples who could not co-reside but who could and often did bear children together' (Sumnall, 2020, 365).

2.2 AGE AT MARRIAGE

The centrality of formal marriage might seem at odds with the 'late and non-universal' marriage characteristic of north-western Europe (Puschmann, 2020, 3). But 'non-universal' here signifies that a significant minority remained unpartnered, not that they were engaging in alternative practices. Moreover, even if couples married at a relatively late age, marriage was still the first form of partnership for the majority of couples in England and Wales, with pre-marital cohabitation being rare.

Here again new research has undermined the findings of earlier studies. One study of marriage registers in Victorian London inferred that pre-marital cohabitation was common from the fact that the same street and sometimes the same house was often recorded for both bride and groom (Ross, 1993). However, further analysis of a sample who married shortly after the 1891 census found that most couples who gave the same address were not in fact sharing a home at the time of the census (Probert et al., 2012).

While teenage marriage was not unknown in England and Wales, throughout the period the average age at first marriage was in the twenties for both men and women. Indeed, in the second half of the eighteenth century the average age at first marriage in England and Wales was in the *mid*-twenties for both men and women, although husbands tended to be a couple of years older than their wives (Wrigley and Schofield, 1981). And even this was slightly lower than it had been in the first half of the century, with both economic opportunities and new cultural norms as to the importance of personal freedom and choice playing a role in encouraging couples to marry at a younger age (Griffin, 2012). Over the first half of the nineteenth century the average age at first marriage was to fall still further (Wrigley and Schofield, 1981), before it rose again towards its close (Office for National Statistics, 2023).

There was, it should be noted, a considerable disjunction between the age at which couples tended to marry and the age at which they *could* have married. The legislation passed in England and Wales in 1753 and 1836 had only specified how marriages should be celebrated, not at what age couples could marry. As a result, the canon law's rules on when couples could marry continued to apply even after jurisdiction over marriage was transferred to the secular courts. Under the canon law, the minimum age of marriage was 12 for a girl and 14 for a boy. Moreover, an underage marriage was not automatically void, as it could be ratified upon the individual attaining the relevant age (Cretney, 2003).

Admittedly, these minima co-existed with complex rules on parental consent for those under the age of 21. Yet parental consent was never an absolute prerequisite for marriage in England and Wales, in that its absence did not necessarily render a marriage void. Only for couples marrying by licence between 1754 and 1822 did an absence of active consent invalidate a marriage, and even then the courts interpreted the meaning of consent generously where the status of a long-standing union was at stake. Most couples married by banns, and the possibility of a parent 'forbidding the banns' and preventing a marriage from going ahead could be easily avoided by the parties marrying in a parish where they were unknown (Probert, 2009). As a result, while the rules on parental consent may have contributed to cultural norms about

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the appropriate age to marry, they did little to prevent couples from marrying at a younger age if they were determined to do so.

The passage of the Criminal Law Amendment Act 1885 also resulted in a further complicating factor: a girl could consent to be married at 12, and thereby was deemed to consent to sex with her husband, but she could not consent to sex outside marriage until she reached the age of 16 (Lammasniemi, 2020). In practice, though, the number of marriages taking place where either of the parties was under the age of 16 was minimal: in 1885 just 20 girls (and no boys) were stated to have married under that age in England and Wales (Office for National Statistics, 2023). Yet despite (or perhaps because of) the rarity of marriages under the age of 16, it was not until 1929 that legislation was passed to raise the minimum age of marriage to 16. The Age of Marriage Act stipulated that any future marriages entered into under that age would be void.

Given the rarity of marriages under that age, it is unsurprising that the change made no difference to the average age at marriage. From 1930 to the late 1950s the average age at first marriage was just over 26 years for men and 23.7 years for women. As in many other Western states, it then fell to an historic low in the 1960s, with an average of 24.2 years for men and 21.8 years for women (Office for National Statistics, 2023). In short, the average age at first marriage was lower at the close of the period than it was at the start (Schoen and Canudas-Romo, 2005).

Even so, the variation in the age at first marriage occurred within a fairly narrow compass. As a result, as the next section will discuss, the key variation in the duration of marriage (and the likelihood of repartnering after the death of a spouse) was the life expectancy of the parties.

2.3 THE DURATION OF MARRIAGE AND THE LIKELIHOOD OF REPARTNERING

A simple calculation based on the average age at first marriage and average life expectancy might suggest that the average duration of marriages in England and Wales was little different from that of those twenty-first-century marriages that end in divorce. However, such a calculation would be seriously misleading. Estimates of life expectancy for eighteenth- and nineteenth-century England and Wales are heavily skewed by infant mortality. The life expectancy of an individual who had reached adulthood and married was considerably higher: by the first decade of the nineteenth century, a man who had reached the age of 30 could expect to live for a further 30 years (Houlbrooke, 1989). Nor did survival rates vary greatly by gender. The risk of dying in childbirth had fallen: by the first half of the nineteenth century there were just 5.5 maternal deaths for every 1000 births (Schofield, 1986). If anything, wives were more likely to survive their husbands than vice versa.

For the late eighteenth and early nineteenth centuries, ascertaining the average duration of marriages is a matter of painstakingly reconstructing the marital histories of individual couples and gradually building up a picture of patterns within specific communities from parish registers and the occasional surviving listing of inhabitants. One such reconstruction for couples resident in the village of Cardington in the late eighteenth century found that the average period from a marriage to the death of either spouse was 28 years; the equivalent period for couples resident in the village of Kilsby in the mid-nineteenth century was 36 years (Probert, 2015). For more recent generations, national-level data enables a typical life-course

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to be reconstructed. A woman born in 1860 could expect to marry around the age of 26 and to lose her husband at the age of 59 before dying herself at the age of 64: a total of 33 years of marriage and 5 years of widowhood. A generation on, and the average age at marriage had dropped slightly and longevity increased, resulting in an estimated 38 years of marriage and 5 years of widowhood (Gibson, 1994).

The duration of a marriage affected the likelihood of the surviving spouse repartnering. Put simply, a spouse who was bereaved at a young age was more likely to remarry than one who was older. Accordingly, as increasing life expectancy led to longer marriages, remarriage became less common. In 1845, 27 per cent of marriages involved at least one previously bereaved spouse; by 1900 this had fallen to 12.6 per cent and by 1969 it was just 4.8 per cent (Office for National Statistics, 2023, Table 2a). There was also a corresponding rise in the average age of those who remarried. In the 1840s, the average age of a widower upon remarriage was just 40; by the end of the century, it had risen slightly to 43, but by the 1960s it was almost 59. A similar rise can be observed for widows, whose average age at remarriage remained under 40 throughout the nineteenth century but rose in the twentieth century to 52 in the 1960s (Office for National Statistics, 2022, Table 6a).

As those statistics indicate, there was a gendered dimension to remarriage. Throughout the period, a widower was more likely to remarry than a widow (Haskey, 2015). There was also a marked difference in terms of the marital status of their new partners. From the 1840s to the Second World War, around two-thirds of remarrying widowers married a spinster. By contrast, from 1845 to 1900, over half of remarrying widows married widowers. While remarriages to bachelors became slightly more common in the first decade of the twentieth century, it was only in 1919, in the aftermath of the First World War, that such marriages accounted for two-thirds of widows' remarriages, and in the 1920s and 1930s remarriages to widowers were once again more common. After the Second World War, however, these differences were less marked: both widowers and widows tended to be older at the time of remarriage, and more likely to marry a partner who had experienced bereavement or divorce than one who had not been previously married (Office for National Statistics, 2023).

2.4 PARTNERING: SINGULAR OR PLURAL?

The general consensus across Christian Europe was that a marriage could only involve two partners (Witte, 2015). While a marriage was subsisting, any further marriage entered into by either partner was void. In relation to divorce, by contrast, the previous consensus across Christian Europe that marriage was for life had already broken down by 1750 (Antokolskaia, 2006). Most Protestant countries – including Scotland – had accepted the possibility of a marriage being ended by divorce in limited circumstances (Phillips, 1988). In Catholic countries, by contrast, marriage was still regarded as a sacrament and divorce was not permitted.

The position in England and Wales in 1750 was a complex one in which divorce was neither accepted nor entirely absent. While divorce by private Act of Parliament had been recognised since the late seventeenth century, only a handful of divorces had been granted in the first half of the eighteenth century (Stone, 1990). Those who remarried during the lifetime of their spouse without obtaining a divorce risked being convicted of bigamy, an offence that might result in branding, or, from the late eighteenth century, transportation (Probert and D'Arcy-Brown, 2019).

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There were nonetheless some who took the risk. As the nineteenth century progressed, those convicted of bigamy were increasingly likely to be individuals whose first marriage had failed, rather than those using a bigamous marriage for sexual or financial exploitation. The sentences awarded were correspondingly lower (Probert and D'Arcy-Brown, 2019). Yet there was also a growing sense that it was unfair to punish individuals simply because they lacked the resources to obtain a divorce and remarry legally. *The Times* was particularly active in campaigning for reform, reporting the case of one unfortunate individual who had remarried after his first wife had left him as an example of the unequal way in which the law operated: with the cost of obtaining a formal separation in the church courts, suing the wife's lover for damages, and then seeking a Parliamentary divorce estimated to be around £1000, it was clearly out of the reach of this labourer, and indeed of the vast majority of the population (Probert, 2019).

In 1857, Parliament eventually passed the Matrimonial Causes Act to allow individuals to seek a divorce from a new civil court. The Court for Divorce and Matrimonial Causes had the power to grant a divorce to a husband who could establish that his wife had committed adultery; a wife, however, had to prove not only adultery but also some aggravating factor such as cruelty, desertion, incest, or bigamy, or alternatively that her husband was guilty of rape, sodomy, or bestiality. Even then, the spouse petitioning for divorce had to be free of any taint of guilt, so their own adultery or marital misbehaviour could result in a divorce being refused.

There were, however, no limits on the 'guilty' spouse being able to remarry. Ascertaining exactly how many individuals went on to remarry after obtaining a divorce is something of a challenge. The official statistics would seem to suggest that remarriage was relatively rare in the first decades of the 1857 Act, when the number of divorces granted and the number of marriages involving one or more divorced parties in any given year are compared (Office for National Statistics, 2022 and 2023). However, these figures are dependent on the information given by couples at the time of their marriage and so are likely to underrepresent the number who had been through a divorce. One longitudinal study of women who obtained a decree of either nullity or divorce in 1858 or 1868 found that over half went on to remarry (Russell, 2019). Those who had been divorced had good reason to strategically conceal the fact when remarrying: the 1857 Act had given Anglican clergy the right to refuse to conduct the wedding of any person who had been divorced on account of their adultery. Many other religious denominations, who were not under the same obligations as the established church to conduct weddings, also refused to conduct remarriages. Concealment was thus a way to avoid such refusals (Probert, 2015; Aston, 2023).

Even so, over the final decades of the nineteenth century the number of known remarriages grew steadily. Even taking into account the cumulative increase in the number of individuals who had been through a divorce, and the fact that every divorce had the potential to lead to two new marriages involving parties who had been divorced, it was nonetheless still striking that by the early years of the twentieth century there were more marriages each year involving a person who had been through a divorce than there were divorces.

In absolute terms, the number of post-divorce remarriages remained relatively low for the simple reason that divorces were still to be counted in hundreds rather than thousands (Stone, 1990; Gibson, 1994). Only in 1918, against the backdrop of the First World War, did the number pass 1000 (Office for National Statistics, 2022). Thereafter, however, it continued to climb. The necessity for wives to prove 'aggravated' adultery was eliminated in 1923 (Probert, 1999), and in 1937 the grounds were extended to include cruelty, desertion and incurable insanity (Redmayne, 1993). Equally significant was the shift in judicial attitudes towards

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petitioners who had themselves committed adultery. Where previously their petitions would have been refused, from the 1920s onward, judges regularly exercised their discretion to grant a divorce, at least where the petitioner's adultery took the form of a stable cohabiting union. Divorce, with the possibility of remarriage, was seen as preferable to continued cohabitation (Probert, 2012).

For those who were unable to obtain a divorce, by contrast, the apparent respectability of a marriage, even if bigamous, was still often preferred to open cohabitation. In the 1960s, however, the number of bigamy cases fell dramatically as more couples felt able to cohabit without going through a ceremony. The greater visibility of cohabitation, combined with the continuing official preference for (re)marriage over cohabitation, was also to be a major influence on the Divorce Reform Act 1969. As the newly established Law Commission highlighted in its 1966 report, a significant percentage of those who were living in 'stable illicit unions' were unable to marry because one of them was already married to someone else but was unable to obtain a divorce (Probert, 2012). The 1969 Act introduced the possibility of obtaining a divorce on the basis of the 'irretrievable breakdown' of the marriage, such breakdown being evidenced either by particular facts or a period of separation (Miles et al., 2022).

Such developments – divorce being made available in countries that had previously not permitted it, restrictive grounds for divorce being gradually widened, and a growing number of divorces being granted – were replicated elsewhere in Europe, although the extent and pace of change varied considerably (Antokolskaia, 2006). In broad terms, though, from the late nineteenth century through to the 1960s almost all Western countries saw an increase in the number of divorces (Phillips, 1988). While most marriages remained intact until the death of one of the spouses, the greater availability and incidence of divorce added to the complexity of partnering across the life-course.

2.5 CONCLUSION

To sum up, while formal marriage remained the dominant form of partnering in England and Wales from the mid-eighteenth century to the mid-twentieth, from a life-course perspective there were a number of significant changes. At the start of the period, relatively low life expectancy meant that a significant minority found themselves bereaved at an age where they could expect to remarry. Over the period, age at first marriage remained more or less stable, but life expectancy increased, marriages lasted longer, and remarriage following bereavement was less common. From the mid-nineteenth century, however, there was the further complicating factor of divorce and the possibility of remarriage thereafter, usually at a younger age than if the first marriage had ended by death.

In the 1960s, however, the age at first marriage dropped to an historic low, with these early marriages being more vulnerable to subsequent breakdown. Those whose marriages had broken down and who were unable to obtain a divorce felt less need than in previous generations to cloak new relationships with the spurious legitimacy of a bigamous marriage. With open cohabitation taking the place of unsuspected bigamy, policy-makers were spurred to enact further reforms to divorce law. The scene was set for partnering across the life course to change even more radically in the decades to follow.

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3. Anthropological perspectives on partnering

Julia Pauli

Anthropological perspectives on partnering have largely focused on marriage. But marriage is used in anthropology to capture a wide range of forms and practices of partnering. These cross-cultural variations make it difficult to define marriage. I start this chapter with a discussion of definitions of marriage in anthropology, including some examples of the variety of partnership forms that anthropologists have summarized under the category "marriage". Next, I outline some of the major changes in theorizing marriage in anthropology. Earlier approaches conceptualized marriage mostly heteronormatively and as a legal and ritualized institution, while contemporary perspectives highlight the lived experiences of becoming, being, and not being married. I then discuss some contemporary themes in the anthropological study of partnering and marriage. I focus on variations of the lived experiences of intimacy, the public celebration of partnership in form of weddings, the entanglement of marriage with wider political and economic contexts, and the opting out of marriage in contexts where marriage is still largely normative. My reflections of this vast field of anthropological research are necessarily partial and very much framed by my positionality and my own research interests. Since the mid-1990s, I have carried out ethnographic research on kinship and reproduction in rural Mexico and, since 2003, on marriage in rural and urban Namibia (Pauli, 2020). Some examples given in this chapter come from these regions.

Many anthropological definitions of marriage come from ethnographic research in Africa. An early example of different forms of partnering summarized as "marriage" is provided in Meyer Fortes's *Web of Kinship among the Tallensi* in West Africa (Fortes, 1949). Among the Tallensi, Fortes writes, it is common that many first unions dissolve after some time. He classifies these as "experimental marriages" (Fortes, 1949, p. 84). Philip Burnham (1987) builds on these insights and other research on African marriages to suggest that we think of marriage not as a stable category but as a "bundle of interactional possibilities" (p. 50). This resonates with Edmund Leach's (1961) earlier definition of marriage as a "bundle of rights" (p. 104), in which no specific set of rights can be assumed to be universal (Mody, 2015). For Burnham, a range of different forms of conjugal unions can be understood as marriage, including informal cohabitation, church marriage, registry marriage, or customary marriage. Along similar lines, David Parkin and David Nyamwaya (1987) observe for marriages in Africa that "[t]his idea of all types of 'marriage' as representing a range of interactional possibilities for individuals and their groups complements that which sees marriage as the product of strategies: the logical possibilities are there, and people can strategize within them" (p. 4). Partnering thus came to be viewed as a (strategic) activity navigating between different marital forms. This perspective has moved anthropological theorizing of marriage beyond the narrow structural and institutional approach to one that focuses on agency and choice (Pauli, 2016).

That marriage is conceptualized so broadly in the study of marriage in Africa – thus making it difficult, maybe even impossible to define (Mody, 2015) – is also prompted by specific characteristics of marriage in many African contexts. Although polygyny has officially declined across the continent (in some countries it has even been prohibited), transformations of the

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practice continue to be common until today (Anderson, 2000; Blanc and Gage, 2000; Karanja, 1994; Lewinson, 2006; Spiegel, 1991). Bledsoe and Pison (1994) conclude: "Many of the new marriage forms that outwardly resemble monogamy actually follow patterns of *de facto* polygyny" (p. 7). Anthropological studies thus describe a wide range of partnerships under the label of "marriage", covering various customary practices, residence arrangements, state and religious laws, sexual and other types of interactions.

In many Western countries, the marital status of a person changes immediately through a delimited and once-off ritualized event, a civil or a religious wedding. In these contexts, a person is either unmarried or married, but cannot be anything in between. In contrast, in many African contexts marriage is a gradual change of status, a process where it is indeed possible to be increasingly married. Through repeated economic transactions, very often of what tends to be called bridewealth – that is, the repeated giving of cattle or other valuables from the groom's kin group to the bride's kin – partners become gradually more and more married (Bledsoe and Pison, 1994; Comaroff and Roberts, 1977; Guyer, 2000; Kuper, 2016). Although bridewealth is generally transferred from the groom's kin to the bride's kin, in what E.E. Evans-Pritchard (1951) describes as "woman marriage" for the Nuer (in present-day South Sudan), a woman's transfer of cattle as bridewealth to another woman's kin makes the former husband and father (p. 107; see also Mody, 2015, p. 600).

This fluid and fuzzy construction of marriage has challenged demographic inquiries that work with clearly defined categories of being either married or unmarried (Mokomane et al., 2006). It can be difficult to define at what point in time someone is married and when a union begins. However, through the influence of colonialism and Christianity, the fluidity of bridewealth payments has in some places become transformed into ritually defined stages of marriage. These stages resemble the Western, Christian practice of engagement and wedding. In my work on marriage in rural Namibia (Pauli, 2019, pp. 136–45), I describe the so-called asking ritual (*!game#gans* in the local Khoekhoegowab language). In pre-colonial times, this ritual was the only one that brought the two kin groups together. Over several days, the groom's kin repeatedly had to ask for the bride and engage in negotiations about bridewealth. After the ritual, the already a little bit married couple became more married as more and more of the bridewealth was given. Today, however, the asking ritual has changed into an engagement, that is, a ritual that comes *before* marriage. Months later, it is followed by a civil and a religious wedding (for more details, see Pauli, 2019, pp. 145–57), with which the couple is considered fully married.

Although the early research on African marriages has thus touched upon a remarkably diverse range of partnering forms, important perspectives are also missing. Feminist and queer critiques of the study of marriage by British social anthropologists like Evans-Pritchard and A.R. Radcliffe-Brown have pointed out the heteronormativity of that line of research and how it ignores queer and non-normative forms of partnering (Basu, 2020; Blackwood, 2005; Boellstorff, 2007b; Borneman, 1996; Mody, 2015). More recently, the anthropology on partnering is opening up to the challenges posed by feminist, gender and queer studies and engages with concepts like love and intimacy.

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3.1 FROM RITUALS AND REGULATIONS TO PRACTICES AND EXPERIENCES

From the beginning of anthropology as a discipline in the nineteenth century, marriage was a core concern of research and theorizing. Comparative and cross-cultural approaches at that time were largely based on racist and sexist assumptions about the "naturalness" of marriage (Borneman, 1996; Carsten et al., 2021a; Mody, 2015), framing marriage as heterosexual and evolutionary in nature. Until approximately the 1960s, marriage continued to be one of the most central phenomena for theorizing in anthropology. Two paradigmatic and contrasting theories – descent theory and alliance theory – explained social order and political organization in non-Western societies without state structures through the regulating power of marriage and kinship (Dumont, 1971[2006]).

First, in descent theory of British structural-functionalism, based mostly on ethnographic work in colonial Africa, descent groups were seen as the central political units. Their reproduction was guaranteed through specific rules of descent and marriage, such as descent through female ancestry (matrilineal societies) or through male ancestry (patrilineal societies). Descent theory saw marriage as a universal, stable, timeless, and recursive institution (Borneman, 1996, p. 220; Pauli, 2016). It was assumed that all members of a society would eventually marry and be an integral part of the reproduction of descent groups and the rearrangement of social structure (Fortes, 1949; Radcliffe-Brown, 1987[1950], p. 81). Marriage was mainly defined in legal terms and conceptualized as a "legitimization" of children, granting the husband and his kin "certain rights in relation to his wife and the children she bears" (Radcliffe-Brown, 1987[1950], p. 50). Radcliffe-Brown stressed that African marriage always involved two "bodies of kin" (p. 46), that is, two kin groups that through marriage reproduce and rearrange social structure. Second, alliance theory, developed by French structuralist Claude Lévi-Strauss, emphasized how, through marriage, different groups formed alliances (Lévi-Strauss, 1981[1949]). According to Lévi-Strauss (1981[1949]), through the systematic exchange of brides among different ethnic groups in Brazil, marriage created and regulated social connections and cohesion (Carsten et al., 2021a, p. 7). Both British descent theory and French alliance theory have been criticized for their focus on the "heterosexual, married human" (Blackwood, 2005; Borneman, 1996, p. 221) and their underlying evolutionist assumptions (McKinnon, 2013). While this critique is certainly appropriate and important, both approaches nevertheless had the merit of demonstrating that marriage "is not only about spouses, but also about groups and societies, and about creating change in their political relationships" (Carsten et al., 2021a, p. 7). Researching marriage (and partnering) through kinship, class, religion, law, and politics continues to shape anthropology's take on the phenomenon (e.g., Abeyasekera, 2016; Maqsood, 2021).

Peervez Mody (2015) has poignantly remarked that, until approximately the mid-twentieth century, anthropological studies of marriage were driven either by its ritual significance or by the institution's regulative importance, "with little consideration of how people actually experienced the processes of marrying and making kin" (p. 599; see also Humphrey, 2015). This very much echoes the general critique of kinship studies that led to the formation of "new kinship studies" from the 1990s onwards (Carsten, 2004; Franklin and McKinnon, 2001; Howell, 2003; Weston, 1991). This new approach revitalized the field by focusing on everyday practices and experiences of relationships, denaturalizing kinship through feminist and queer theorizing, and developing new concepts to think about social connections, especially

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"relatedness" (Carsten, 2000) and "kinning" (Howell, 2003). However, "much of this work has privileged the study of birth and reproduction over marriage" (Carsten et al., 2021a, p. 7). Consequently, Janet Carsten and her collaborators (2021a) have called for a denaturalization and rethinking of marriage through ethnographic and comparative anthropological studies, paying close attention to lived experiences and non-normative practices. Their comparative study of marriage in six different cultural contexts (Botswana, the United States, Greece, Taiwan, Sri Lanka, and Malaysia) shows not only that marriage is affected by societal transformation but also that it stimulates social change (Carsten et al., 2021b).

Another substantial contribution toward a practice-based, inclusive, and decolonial anthropological understanding of partnering and partnership comes from anthropological studies of love, as Mody's (2022) recent overview of studies of intimacy and the politics of love in anthropology attests. In the 1990s, sociological studies on love, sexuality, and romantic relationships (e.g., Giddens, 1992; Illouz, 1997) crucially reconfigured the thinking on partnering in the social sciences. Until then anthropology had "devoted considerable attention to kinship, courtship, and marriage but shunned examinations or explicit theorization of love" (Thomas and Cole, 2009, p. 6). This changed with the early 2000s. Since then Mody (2022) observes "an explosion in the anthropological study of love globally with attention focused more sharply on the gendered and emotional content and meanings of love, intimacy, sexuality, and desire" (p. 273). These ethnographic studies, however, strongly question the assumption of a global "westernization" and "modernization" of love and marriage, as proposed by sociologists like Anthony Giddens, which "uncomfortably homogenized the particularities and complexities of the non-Western world" (Mody, 2022, p. 273). Instead these studies show a tremendous diversity of local responses to the "globalization" of intimacy, sexuality, and love (Cole and Thomas, 2009; Hirsch, 2003; Hirsch and Wardlow, 2006; Hirsch et al., 2009; Hunter, 2010; Padilla et al., 2007; Spronk, 2012).

My brief outline shows that, today, there is a much greater diversity in conceptually describing intimate relationships in anthropological studies, using concepts like love, conjugality, intimacy, or proximity (Obadia, 2020). However, marriage has not lost its importance for the study of partnering in anthropology. Much contemporary anthropological work on love also addresses marriage (e.g., Freeman, 2020; Haenn, 2020; Hirsch, 2003; Hunter, 2010; Mody, 2008). Contemporary anthropological studies of partnership as marriage stress marriage's ambiguities, raptures, complexities, and uncertainties. Carsten and her collaborators (2021a) observe that it is exactly this ambiguity that caused earlier generations of anthropologists like Leach to struggle to define marriage. Marriage, according to Carsten et al., "is an unusually flexible and expansive institution – it can take many forms, sometimes simultaneously" (p. 26). Consequently, there are many subfields in the contemporary anthropological study of marriage, love, intimacy, and partnering. In the following I concentrate on summarizing some recent anthropological perspectives on (a) forming and living intimate relationships; (b) ritualizing and celebrating intimate relationships; (c) framing intimate relationships; and (d) opting out of marriage. There are other important fields of the anthropological inquiry into partnering, such as the influence of social media on intimate relationships (see Mody, 2022, p. 278), which I am unable to cover here.

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3.2 CONTEMPORARY THEMES, THEORIZING, AND FINDINGS

3.2.1 Forming and Living Intimate Relationships

The vantage point of much contemporary anthropological work on intimate relationships is to ask when and under what conditions intimacy is being experienced. Marriage might or might not be relevant: "Rather than assume the centrality of marital relations, anthropologists need to demonstrate in particular cases whether marriage constitutes the focal relationship or not" (Blackwood, 2005, p. 15). This implies an ethnographic openness to all dimensions of partnering. Scholars no longer assume but ask who interacts with whom intimately and why, in what situations, and under what political and social conditions, and how specific kinds of intimacy are being made and remade.

Especially feminist and queer studies of kinship, love, and relatedness have substantially expanded anthropological knowledge and thinking about partnering (Boellstorff, 2007a; 2007b; Mahmud, 2021; Weston, 1993). Early and influential examples are Kath Weston's (1991) study of gay and lesbian practices and notions of kinship, love, and friendship in the San Francisco Bay Area during the 1980s and John Borneman's (2001) ethnographic work on queer kinship and care in East Berlin in the 1990s. Borneman shows how his interlocutors (that is, the persons he got to know well during his ethnographic fieldwork and from whom he received many crucial insights) had to use different notions of kinship, especially ideas of affinity and descent, to live their intimate relationships publicly. Criticizing the normative forces of state and society that impinge upon his interlocutors, Borneman (2001) suggests a radical rethinking:

> This suggests that I am identifying a shift in the object of anthropological research already well under way, away from either the institution of marriage or categories of kinship, sexual identities, gender inequality, or of power differentials generally, to a concern for the actual situations in which people experience the need to care and be cared for. (p. 43)

The foundational importance of care for the formation and continuation of intimate partnering is also demonstrated in Elisabeth Kirtsoglou's (2004) research on a lesbian secret society of married and unmarried women calling itself a "parea" that had its base in a small-town bar outside Athens. Mody (2022) provides some recent ethnographic examples of the relevance of care (but also its opposite, domestic abuse) in heteronormative partnering in India. Emerging ethnographic work on polyamorous partnering also emphasizes the relevance of care (Roodsaz, 2022).

Rahil Roodsaz's (2022) ethnographic research on polyamorous partnering in the Netherlands, however, also highlights more troubling aspects of contemporary intimacies and partnering. Sustaining a polyamorous relationship demands materializing "contemporary late-capitalist demands of self-management and self-improvement" (p. 12). Roodsaz's interlocutors speak of "hard work" to describe how they experience their partnering. This resonates with other ethnographic research on the neoliberalization of love, marriage, and partnership (Freeman, 2014; 2020; Pauli, 2022c) and the anthropological critique of an idealization of "Western" notions of love, romance, and companionate relationships (Mody, 2022, p. 273). Mody (2022) observes that "many anthropologists have been at pains to point out the parlous state of uneven distribution of the intimacy grid" (p. 273). Heterosexual couples in urban Namibia, for example, meander between their temporary successes at self-optimization – enjoying, for example,

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a slimmer body – and the anxiety that all could be in vain, their efforts and hard work not being enough (Pauli, 2022c). This line of research indicates that, in different regions of the world, intimacy and partnering are increasingly becoming never-ending projects of self-improvement, a dynamic which too often is experienced with "cruel optimism", as Laurent Berlant (2011) so aptly points out. If couples become parents, neoliberally inspired techniques of optimization might also be extended toward their children (Pauli, 2022c). Parenthood is thus another important field of inquiry for anthropological studies of marriage and partnering (which cannot be addressed in more depth here, but see McKenzie, 2022).

3.2.2 Ritualizing and Celebrating Intimate Relationships

Weddings globally have been transformed by changing ideas about the self and the collective. In her research on marriage in Botswana, Jaqueline Solway (1990; 2016) notes that a new form of personhood, embedded in capitalist modernity, is becoming visible in wedding celebrations (see also Pauli, 2011; 2022b; Reece, 2019; Van Dijk, 2017). Changing consumption rituals, often hybridizing local practices of celebrating with global forms like the white wedding dress, have in many regions of the world substantially raised the costs of getting married (Argyrou, 1996; Kendall, 1996; Lankauskas, 2015; Mupotsa, 2014; Pauli, 2019; Pauli and Van Dijk, 2016). These new forms of ritualized consumption are not only found in weddings but also inform non-marital intimate relationships. In rural Namibia, for example, cohabitating couples have specific expectations of care and gift giving toward each other (Pauli, 2019, pp. 227–50).

Ethnographic work from Southern Africa shows that these developments have triggered complex reconfigurations of kinship. While marriage in Southern Africa used to be largely based on the negotiations between two kin groups (Kuper, 1982; 2016), with the marrying couple playing a rather minor role, in recent times the influence of the spouses on their wedding process has increased substantially (Gulbrandsen, 1986; Solway, 1990; 2016; Van Dijk, 2017). More and more marrying couples from the emerging African middle classes want to decide by themselves how to celebrate their weddings and how much they want to pay for it, thus questioning the authority of their kin. This leads to conflict with their kin (Williams Green, 2021; Pauli, 2022c; Reece, 2021). The material and financial empowerment of spouses demonstrates a more general reconfiguration of the region's political economy, with power shifting from senior to junior generations (Gulbrandsen, 1986; Solway, 1990). These dynamics also show how strongly marriage and partnering continue to be framed and formed by economic and political conditions.

3.2.3 Framing Intimate Relationships

Contrary to "love's apparently allergic relationship to capitalism, commoditization, and economic exchange" (Mody, 2022, p. 274), numerous anthropological studies have shown the multiple entanglements between the economic and the intimate. Earlier research on kinship and marriage focused on household structures, generations, and the gendered division of labor, scrutinizing, for example, how residence patterns after marriage (that is, norms where newlyweds should live) shape economic strategies of households and families (e.g., Robichaux, 1997; Wolf, 1972). Ethnographic studies have demonstrated how patrilocal residence – with the wife moving to the household of her husband's kin – helps to keep the work force of father, sons, and brothers together. At the same time, this pattern causes major suffering for many

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incoming daughters-in-law (Dickerson-Putman and Brown, 1998; Gammeltoft, 2021; Pauli, 2008). Until the late 1990s, wives in Central Mexican villages lived many years, and suffered, in the houses of their mothers-in-law. Migrating husbands remitted to their mothers, seldom to their wives. Since then the pattern of migration and sending of remittances has changed and with it the interactions between daughters-in-law and mothers-in-law (Pauli; 2008, 2013). Couples now plan the husband's migration, and husbands remit to their wives. The couples use the income to construct their own houses, thus investing in their future, and they often skip patrilocal residence after marriage (Pauli and Bedorf, 2018). This shift also indicates that new forms of companionate marriage and partnership have developed, enhancing the agency of younger couples and wives (see also Haenn, 2020; Hirsch, 2003; LeVine and Sunderland Correa, 1993).

The economic entanglements between marriage and migration are a major theme in current anthropological work on partnering and intimate relationships. Caroline Brettell (2017) summarizes major trends and practices, ranging from so-called "mail-order brides" to transnational partnering and kinship (see also Cole, 2016; Constable, 2005; Drotbohm, 2009; Lapanun, 2019; Luncă, 2020; Yamaura, 2020). Dinah Hannaford's (2017) work on transnational migrants from Senegal working in Europe, for example, highlights how eligibility for partnering and marriage is tied to economic success achieved through migration and is expressed through the building of a house.

Another modern myth of intimacy, the assumption that "modernization makes intimacy or love less political as it becomes more individual" (Mody, 2022, p. 281), is also forcefully debunked by anthropological research. Mody (2022) discusses a number of recent ethnographic studies on the political aspects of love, marriage, and partnering, primarily from South Asia. An especially telling example of such a politicization of love and marriage is the so-called "love jihad", an unsubstantiated conspiracy theory fostered by Hindu religious nationalists who combine "the idea of love with a religious war waged by Muslims against Hindus" (p. 279). This and many other ethnographic examples powerfully demonstrate the impossibility of separating partnering and marriage from their economic and political framings and conditions.

3.2.4 Opting Out of Marriage

While earlier generations of anthropologists like Radcliffe-Brown or Lévi-Strauss assumed that marriage forms and sustains social and political order, many contemporary anthropologists show how fragile the institution in fact often is. Recent anthropological research describes and theorizes the multiple ways of "opting out of marriage" in different parts of the world (Davidson and Hannaford, 2022). Separation and divorce have become important fields of anthropological inquiry, opening up new ways of thinking about kinship, relatedness, and partnering (Alexy, 2020; Macfarlane, 2012; Medeiros, 2018; Simpson, 1998).

Further, marriage globally is increasingly being delayed (Inhorn and Smith-Hefner, 2021; Smith, 2020), leaving many people in a state of "waithood" (Honwana, 2012; Singerman, 2021). The reasons for the postponement of marriage and partnering are complex. To stay single can be the outcome of deliberate choice (Allerton, 2007; Lamb, 2018) or the result of the contingencies of life (Pauli, 2022a). In many unequal and economically stratified societies around the globe, weddings have turned into markers of class distinction. Conspicuous and expensive weddings make it near impossible for many people to marry (Pauli and Van Dijk,

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2016). Some might go into debt for their weddings (James, 2017), while others labor to get married with the help of friends and kin (Pauli and Dawids, 2017). The majority, however, delay or stop marrying (e.g., Baral et al., 2021; Masquelier, 2005; Pauli, 2019; Posel et al., 2011), living in other forms of partnership outside and beyond marriage. In several regions of Southern Africa, for example, cohabitation is now more common than marriage (Hunter, 2010; Pauli, 2019, pp. 227–56; Setume, 2017).

As early as 1996, Borneman criticized that the "empirical neglect of the non-married in anthropology impoverished our ability to theorize human sociality" (cited in Borneman, 2005, p. 31). "Non-married" is a vague category, including, for example, singlehood, cohabitation, or widowhood (Davidson and Hannaford, 2022; Davidson, 2020). Today, an increasing number of ethnographic studies addresses the non-married, further reconfiguring and deepening anthropology's understanding of partnering in global and comparative perspective.

3.3 CONCLUSION

Anthropological theorizing and researching of partnering have moved from a focus on marriage toward one on a greater multiplicity of concepts and contents of intimate relationships. Marriage, however, remains important, albeit differently from the earlier approaches. Today, marriage and partnering in anthropology are seen less as social ordering mechanisms to reproduce societies or create social connections and cohesions between groups, and more as highly politicized and "economicized" fields, including that of the non-married.

It is likely that future anthropological research will continue along this line, focusing on the complex connections and entanglements between the intimate and the political/social and economic. Working toward a better understanding of the complexities that underlie the forming, maintaining, and ending of partnerships, anthropology also profits from the perspectives of neighboring disciplines. The neoliberalization and commodification of intimacy, love, and marriage have, for example, also been noted in sociology and queer studies (e.g., Lo, 2023; Pauli, 2022c; Zelizer, 2005). This emerging interdisciplinary research has a global and comparative scope, asking how ideas and practices of optimizing bodies, selves, and intimate relationships are translated, framed, and practiced in diverse communities and regions of the world. Anthropology's ethnographic and comparative approach offers important insight into similarities and differences of perception and practices of neoliberalized partnering. Further, anthropology's continuous emphasis that all partnering is embedded in a wider social universe of kin and relatedness (Carsten et al., 2021a, p. 7) adds a unique perspective for understanding intimacy as present between more than only spouses or partners.

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4. Sociological perspectives on partnerships

Brienna Perelli-Harris and Sharon Sassler

Sociologists and demographers have adopted a range of perspectives to better understand partnership formation and dissolution, and how these processes change over time. Sociological perspectives implicitly consider how individuals and couples are embedded within social, economic, and political contexts, and how individuals' decisions aggregate up to shape and change populations. Components such as gender, age, and education are fundamental to defining population structures, with ethnicity, race, sexual orientation, and socioeconomic status key to understanding stratified patterns of behavior. Partnering behaviors also change over the life course, for both structural and behavioral reasons. Sociological and demographic perspectives draw on a range of data sources: official statistics, surveys, focus groups, in-depth interviews, and big data. The discipline is unbounded by methodology, spanning quantitative modeling to policy analysis and case studies to qualitative investigations. Thus, the field incorporates a broad umbrella of studies, with all fundamentally aiming to provide insights into how individual behaviors are intertwined with the social.

The socio-demographic field is not always explicitly engaged in theory building; instead, a body of evidence may accrue over time, resulting in a gradual development of explanations for family behavior. Nonetheless, below we focus on prominent theories that have framed the debate for understanding transformations in partnership behavior. We start with theories which primarily take a macro-level approach, attributing family change to social and economic change, some of which occurs along different strata within countries. We then focus on the institution of marriage itself and how the meaning of marriage has broadened. Next, we discuss theories exploring processes within couples, for example how partners interact, bargain, negotiate, and make decisions, particularly within the context of gender roles and expectations. Finally, we drill down to the individual, interrogating how the self has become all-encompassing, having fundamental implications for partnerships and families. All of the theories are united by exploring the tension between the individual and society, with couples and families bridging the two.

4.1 MACRO-LEVEL FAMILY SYSTEMS

The theories covered here take a macro-level approach to explain societal change, and all grapple with common challenges. Many sociological theories of the family argue that the trajectory of change is unidirectional, with certain countries (usually the Nordic countries) the forerunners of new behaviors. Although authors may acknowledge diversity in the rate of change across countries, for example due to cultural or political context, most assume a general progression towards a new family regime and rarely allow for stagnation, much less reversal.

Partnership formation is an inherent aspect of the concept of the family, and thus embedded within theories of *world family systems*. The family systems approach attempts to make sense of human behaviors and views the family as a complex system of individuals who are both

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interconnected and interdependent. One of the early studies of the family was William Goode's *World Revolution and Family Patterns* (1963), which provided a comprehensive description of family schema across the world. Goode theorized that industrialization would alter family arrangements, ultimately converging on the conjugal, or nuclear family, dominated by the marital breadwinner model. Although Goode was unable to predict the rise of divorce, much less the emergence of cohabitation or serial partnerships, his predictions about the weakening of parental control in choosing marriage partners and the shift to conjugal families were more prescient (Cherlin, 2012). Later theories of global family systems also sought to describe and predict the direction of family change, potentially running afoul of "reading history sideways" by assuming that transformations occurring in forerunner countries would inevitably spread to laggards (Thornton, 2001). For example, Therborn (2004; 2014) provided a sweeping global overview of family systems, focusing on the role of sex and power, and questioning whether systems were converging. In the end, he argued that family systems were not converging, but continued to remain diverse (Therborn, 2014). Others have also attempted to make sense of the complexity of family systems; for example the Global Family Change team (Pesando et al., 2019) have posited an association between changing partnership behaviors and human development, but struggled to identify patterns that comprehensively describe the diversity of family and partnership practices.

One of the most prominent global theories has been the *Second Demographic Transition* (SDT) (van de Kaa, 1987; Lesthaeghe, 2014). The SDT posits that new family behaviors, such as the decline in marriage, increase in divorce, and rise of cohabitation, are due to lifestyle choices related to shifts in ideas and values (Lesthaeghe, 2014). Like most family systems theories, the SDT also assumes a convergence of family behaviors, although the authors recognize the persistence of "deeply rooted cultural features" (Lesthaeghe, 2014). The SDT can be understood as having two components: (1) a description of the proliferation of new partnership and fertility behaviors and (2) an underlying explanation for these changes. The SDT predicts an ultimate direction of convergence: as marriage declines, divorce and cohabitation will increase; and childbearing will be decoupled from marriage, although the intensity and sequence of these changes may differ across societies. Extensive evidence indicates that many of these new trends are emerging globally, (e.g. Raymo et al., 2015; Esteve et al., 2012; Perelli-Harris et al., 2012; Sassler and Lichter, 2020); however, the evidence for the reasons underlying these behavioral shifts is less consistent. Lesthaeghe argues that the underlying drivers are ideational, grounded in Maslow's theory of changing needs and oriented towards self-actualization and individualization. According to the SDT theorists, although macro-level economic changes may play a role, cultural shifts in values and tolerance have been the primary factor leading to changing behavior. As values shift, people reject authority and patriarchal institutions, which inevitably leads to the decline of marriage (Lesthaeghe, 2014).

The SDT has been critiqued for a number of reasons (see Zaidi and Morgan, 2017; Coleman, 2004); however, the most pertinent angle related to partnership formation is the idea that marriage decline is due to the pursuit of self-actualization and rejection of the institution of marriage. Lesthaeghe posited that the university educated were the forerunners of the SDT, and yet empirical studies have found that while most couples now begin their relationships with cohabitation, the least educated are more likely to remain in cohabitation, particularly at the time of childbearing (Perelli-Harris et al., 2010; Mikolai et al., 2018). This evidence has challenged the assertion that self-actualizing couples are rejecting marriage; instead couples who struggle to afford the prerequisites for marriage, e.g. stable, decent employment, are more

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likely to remain in cohabitation (Perelli-Harris et al., 2010). Globalization has exacerbated these trends, as the least educated are most likely to experience economic precarity. Thus, childbearing within cohabitation is characterized by a *Pattern of Disadvantage* that leads to greater stratification within countries (Perelli-Harris and Gerber, 2011). Similar explanations have also emerged in the United States. McLanahan's *Diverging Destinies* thesis (2004) posited that women with the greatest opportunities and resources were more likely to delay marriage and childbearing, while those with the fewest resources were more likely to have a birth outside of marriage. These perspectives predicted a divergence in family behaviors within countries, particularly in countries where economic inequality was increasing. Marriage becomes the domain of the rich and less common among the poor (see also Cherlin, 2020).

Linked to these perspectives are theories which posit that the decline in marriage and the increase in divorce are due to *the shifting economic foundations of marriage* (Becker, 1991; Sweeney, 2002; Ruggles, 2015). Such changes began in the middle of the twentieth century, when women entered the labor market, and men's economic power started to decline. Ruggles (2015) argues that in America, the *rise and decline of wage labor*, for both men and women, has had deleterious consequences for marriage. According to Becker (1991), women's employment, particularly for the highly educated, reduced women's gains to marriage, and hence the incentive to marry and stay married. This perspective assumed a *Specialization and Trading* model of marriage, with men taking on the breadwinning role, and women expected to focus on the home (see also below). Yet, Becker's perspective neglected the positive contribution that women's employment could make to the household economy. In her *Career-entry Theory of Marriage Timing*, Oppenheimer (1988) argued that the changing labor market has altered the marital bargain, with potential wives increasingly valued for their own labor market contribution. Women pursuing education and careers postpone marriage in order to optimize their marital prospects. Men, on the other hand, have a higher economic barrier to be considered attractive marriage partners. Men who face *employment uncertainty* are therefore slower to transition to marriage and remain longer in cohabitation (Oppenheimer et al., 1997; Kalmijn, 2011). Again, these theories help to explain the increasing divide in marriage and divorce by socio-economic status, particularly in the United States (Sweeney, 2002; McLanahan and Percheski, 2008).

Although women's labor force participation is key to the theories above, several theorists go further to place shifting gender roles and relations at the core of partnership change (e.g. Goldscheider et al., 2015). Theories based on the *Gender Revolution* argue that partner relationships fundamentally evolve as gender roles become more equal. Most societies have only progressed through the first half of the Gender Revolution in which women make gains in the public sphere (education and employment), but have stalled in the second half when men are supposed to contribute more to households and childrearing. These authors argue that gender equality within society, and also within partnerships, leads to greater partnership stability. The focus of the theory, however, is on the slow pace of progress towards attaining gender equality. It does not seek to explain the decline in marriage, perhaps because the cradle of the Gender Revolution has been the Nordic countries, where the majority of childbearing occurs outside of marriage, with marriage often serving as a capstone (Holland, 2013; Blom et al., 2023). The Gender Revolution theory also implies a unilinear social trajectory, even though the evidence for any country having true gender equality is limited (Eeckhaut and Stanfors, 2021).

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4.2 THE INSTITUTION AND MEANING OF MARRIAGE AND COHABITATION

The theories discussed so far focus on societal level processes: modernization, globalization, economic inequality, and gender equality. Another body of work describes how the institution of marriage itself has been in decline, or become *deinstitutionalized* (Cherlin, 2004; 2020). With the rise of divorce, cohabitation, and same-sex marriage, the social institution of heterosexual marriage has been challenged, although the symbolic importance of marriage, for example celebrated with a wedding or the exchange of rings, appears to remain strong (Sassler and Miller, 2023). Cherlin (2020) admits that his original concept of "deinstitutionalization" lacked grounding in institutional theory, and subsequently elucidated three pillars supporting the institution: a regulative pillar taking into account legal and religious rules; a normative pillar based on values and social norms; and a cultural-cognitive pillar, relying on cognitive schema that provide symbols and meaning. Structural changes, for example in the labor market and through access to birth control, place pressure on the institution of marriage by reducing the need for a traditional breadwinner arrangement. As alternatives to the traditional life course increase, and spouses' roles shift, marriage becomes more individualized. Cherlin (2020) points out that individualization within marriage may not have advanced as far as expected; for example, the male breadwinner model is still pervasive. Thus, according to Cherlin, although the deinstitutionalization of marriage has progressed in that it is no longer the only alternative living arrangement for couples, far less change has occurred with how the institution functions for couples' relationships.

Others have explored how it is not only the institution of marriage that has changed, but also how the *meaning of marriage* has changed, with *cohabitation* emerging as a viable alternative option and taking on its own new meanings (Perelli-Harris et al., 2014; Hiekel et al., 2014). Early studies of cohabitation classified the living arrangement into *typologies*, such as alternative to single, pre-marital, alternative to marriage, and indistinguishable from marriage (Kiernan, 2001; Heuveline and Timberlake, 2004). A cross-national focus group study conducted in Europe and Australia provided further insights into explanations for choosing to cohabit or marry, while recognizing the heterogeneity in partnerships within and across countries (Perelli-Harris and Bernardi, 2015). The study found that in most countries, marriage is no longer a necessity for living in an intimate partnership, but nonetheless signifies greater *commitment* to the relationship than cohabitation. However, other markers of commitment, such as purchasing a house or having children together, may be greater than marriage. Increasingly, the timing of marriage has shifted to later in the relationship, possibly after raising children, in what has been called a "capstone marriage" (Holland, 2013). The focus groups revealed that in most countries (with the exception of eastern Germany) marriage is still valued as a sign of love and unlikely to disappear any time soon. However, the timing, duration, and prevalence of marriage continues to vary from couple to couple.

The focus groups also found that cohabitation was usually seen as a *testing ground*, representing greater freedom, independence, and flexibility (Perelli-Harris et al., 2014). The majority of couples enter into co-residential partnerships by living together without marrying and use cohabitation to ensure their relationship is strong enough for marriage. Testing the relationship allows couples to postpone a costly wedding and *avoid a costly divorce* (Perelli-Harris et al., 2017). "Marriage represents a way for couples to think about their long-term future together, while cohabitation allows couples time to make sure that they want to be together in the future"

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(Perelli-Harris et al., 2014, p. 1070). Nonetheless, the meaning of cohabitation can shift across the life course as couples become more committed (Sassler and Miller, 2023). Some couples remain in cohabitation for the long term without the need for marriage. Such couples are not opposed to marriage per se, but do not see an urgent need for it. On the other hand, some qualitative studies have interviewed individuals who are ideologically opposed to marriage, believing it to be "just a piece of paper" (Perelli-Harris et al., 2014; Sassler and Miller, 2023). All in all, research has illuminated a diversity of experiences and meanings of cohabitation, which contrasts with the consistent function of marriage. Studies have also found that the role of cohabitation and marriage in the partnership formation process differs across countries, reflecting historical and social norms (Hiekel et al., 2014; Perelli-Harris et al., 2014).

4.3 GENDER RELATIONS WITHIN PARTNERSHIPS

Historically, theories premised on traditional behaviors expected of men and women (such as Goode's) presumed role complementarity, with women performing the bulk of the care work while men assumed the primary responsibility for economic providing. As theories such as the Gender Revolution have emerged, the impact of gender relations within partnerships has also evolved. Yet theories that seek to account for power dynamics within couples remain rare, with inadequate attention paid to couple-level interactions, even as the relative axes of negotiation and exchange between partners have shifted.

Family scholars have long been interested in how heterosexual couples bargain to achieve desired ends. *Bargaining Theory* examines social interaction processes through the lens of rational choice logic. According to this perspective, individuals bring attributes to each relationship that are imbued with value, and partners draw on such resources (employment; educational attainment; earnings) as they seek to attain a desired end (Becker, 1991; Blood and Wolfe, 1960). Whereas early studies on marital bargaining focused on which partner made the final decision over major economic expenditures for the family (houses, cars, vacations) (Blood and Wolfe, 1960), scholars increasingly utilize bargaining theory to assess couple decision-making over family processes – transitioning into a marriage, bearing a(nother) child, or determining who performs more or less domestic labor or childcare. The nexus between power and decision-making, however, is often gendered. Both partners do not necessarily come to the table with equal bargaining power. In fact, men's and women's resources are usually asymmetric, not only by virtue of men's greater likelihood of being in the paid labor force and higher returns to their attributes relative to women (the gender wage gap), but due to national family supportive policies (Collins, 2020) and expectations regarding appropriate roles for men and women (Knight and Brinton, 2017) relating to childbirth and parenting (Kaufman, 2020).

Differential access to resources and decision-making power are evidenced among couples where desired outcomes may not be shared. For many family decisions, the evidence suggests that men continue to hold greater power in couple decision-making. While women's greater labor force participation has increased their power in certain domains – employed women do less housework, get more childcare assistance from partners, and have greater control over money than do their non-working counterparts – women's employment has not equalized their balance of power relative to men (Sayer, 2005). Within the family realm, men continue to have greater control over relationship progression (from cohabitation to marriage, for example)

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(Brines and Joyner, 1999; Parker, 2021; Sassler and Miller, 2017). Furthermore, the evidence suggests that even when both partners work equivalent amounts in the paid labor force, men continue to perform less child care and domestic labor than their female partners – though there is considerable heterogeneity across countries (Bianchi et al., 2014; Sayer, 2005).

Some research suggests that bargaining power may differ across social class, with women in higher status couples better able to negotiate more favorable outcomes than women in less economically advantaged positions; the relationship between resources (earnings, educational attainment) and more gender equitable outcomes is greater at the top end of the income spectrum than in the middle or bottom (Brines, 1994; Schneider, 2011). Whether by dint of greater educational attainment or higher relative earnings, advantaged women may have accrued more marital capital that can be used to strengthen their bargaining power vis-à-vis partners that less advantaged women lack (Sassler and Miller, 2017). There is evidence, for example, that union dissolution is no longer greater among couples where the woman has higher levels of educational attainment than her spouse (educational heterogamy) (Schwartz and Han, 2014).

Other research highlights the salience of *Exchange Theory* in shaping union formation. The social exchange perspective draws on economic arguments regarding individuals' utility-maximizing behavior in the search for partners with the most desirable characteristics (Becker, 1991). As individuals with more desirable attributes pair off with each other, couples end up including partners who resemble each other on different characteristics (Becker, 1991): social class, race, educational attainment. But because the attributes valued in men and women have historically differed, traits viewed as desirable in one sex may be less valued in the other. Whereas men's earnings ability could excuse many other personal shortcomings (Bernard, 1981), for women, physical beauty or social class status could substantially improve their choices in the marriage market. Scholars have long viewed interracial relationships as evidence of status–caste exchange (e.g., Merton, 1941). More recent research on union formation has focused on nativity and citizenship as valuable commodities in the partner market, or how cohabitation may be utilized to winnow out more heterogamous unions prior to marriage (Blackwell and Lichter, 2004; Saarela and Finnäs, 2014; Sassler and Joyner, 2011). One major challenge to utilizing exchange perspectives in contemporary studies of union formation results from changes in how women's attributes are valued, as the weight that women bring to relationships has changed considerably more than the values assigned to men's attributes. Social exchange perspectives offer a relatively static view of the attributes important in mate selection, whether they vary across societies, and how they differ across time (e.g., Schwartz and Han, 2014).

4.4 THE RISE OF INDIVIDUALISM AND THE DESTANDARDIZATION OF THE LIFE COURSE

The increase in individualization, pitted against normative constraints, is a common theme across sociological theories explaining family change. Some sociologists, however, go into detail about how individualization leads to the transformation of interpersonal relationships. Anthony Giddens (2013[1992]) writes of the *Transformation of Intimacy*, through the upheaval of sexual relations that results in "pure relationships". Pure relationships are detached from social mores and the need for reproduction, allowing women freedom and equality, and hence upending the past order of gendered power. In *The Normal Chaos of Love*,

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Beck and Beck-Gernsheim (2018[1995]) vividly describe how increasing individualization directly impacts the way people love. They argue that the pursuit of love has become turbulent and relentless. Relationships have become fraught, a battle between the sexes, leading to a fear of commitment and a reluctance to marry. Because societal norms have relaxed, individuals are now released from gender roles and marriage and able to choose their own "do-it-yourself biography". Yet such freedom and constant engagement in self-reflection risks the end of contentment and, subsequently, commitment. As individuals seek perfection, partnerships are no longer stable and secure, and societies experience an increase in churning: separation, repartnering, and serial partnerships. And increasingly, individuals are remaining single, avoiding the entanglement of romance altogether (Bloome and Ang, 2020; and Kislev, Chapter 11).

The idea of individualization has also been key to studies examining the *destandardization of the life course*, particularly in conjunction with entrance into adulthood (Brückner and Mayer, 2005; Settersten, 2007; Billari and Liefbroer, 2010). This perspective is useful for recognizing how life courses are changing, especially with respect to partnership formation. Partnership formation, including both cohabitation and marriage, is intrinsically intertwined with other important life events, such as leaving the parental home, education, employment, buying a house, and childbearing (Billari and Liefbroer, 2010). In the past, these events traditionally occurred in a standard sequence; however, now they may occur in any order (Mayer, 2009). Throughout many countries, the transition to adulthood has shifted from being early, contracted and simple, to late, protracted, and complex (Billari and Liefbroer, 2010), with the postponement or eschewal of marriage becoming a key factor in delayed adulthood. These destandardization processes have occurred similarly by gender, with the lives of men and women increasingly resembling each other. Yet as relationships have become more flexible and fluid, the partnering process has become even more multifaceted with the increase in short-term sexual "hook-ups", internet dating, serial and concurrent relationships, living-apart-together relationships, uncertain coresidence, and life-long singlehood (Sassler, 2010). Thus, the concept of the life course is key to understanding how partnership behaviors and aspirations change as individuals mature and settle down, but at the same time, relationship churning can continue to occur late into the life course as individuals dissolve and re-form unions (Sassler, 2010).

4.5 CONCLUSION

This chapter has provided a brief overview of the main demographic and sociological theories that explain changes in partnership formation and dissolution, including the decline in marriage, rise in divorce, and increase in cohabitation. The theories posit how processes of change have occurred at the macro-level, reflecting fundamental social and economic forces, and trickle down to influence individuals in their decisions about moving in with partners and marrying. Some perspectives directly question the relevance of the institution of marriage and explore how cohabitation has become an alternative family form that reflects relationship uncertainties. Other theories explicitly address power dynamics within couple relationships, speculating about how new gender roles and norms have changed the way partners interact. Overall, the theories described above have led to many insights into human behavior, but nonetheless as global events continue to spur social change, analytical gaps in these theories become more evident.

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First, all of the theories inherently incorporate the concept of change, striving to explain the new observed patterns of marriage, divorce, cohabitation, and childbearing within cohabitation. Many embrace the idea that societies are developing along a unidirectional trajectory, similar to the (first) demographic transition to low mortality and fertility. Undoubtedly, some change does seem permanent. Life courses have become increasingly destandardized, with decisions about living with or marrying a partner becoming more of a choice. It is unlikely that high income societies will stigmatize cohabitation and revert to a standard sequence of direct marriage and childbearing. However, many questions remain about the end-point of destandardization and future of marriage. Will marriage disappear altogether, especially as a setting for childbearing? Or will the percentage of births outside of marriage plateau or even reverse as marriage becomes popular again?

Overall, the end of marriage seems unlikely. Although individualization has become widespread, human beings still have a need for an emotional bond, and recent studies have indicated that marriage provides a way of symbolizing and publicly recognizing that bond (Perelli-Harris et al., 2014). Marriage itself remains a marker of high quality relationships (Perelli-Harris and Blom, 2021). As Cherlin concludes (2020), although the institution of marriage has changed, and the timing of marriage within intimate relationships has been delayed, marriage still remains an aspiration, at least in the United States. In Europe, marriage often indicates a higher level of commitment between couples; however, the ordering of marriage and childbearing differs across countries (Blom et al., 2023). Thus, current theories, especially macro-level theories, tend to neglect the persistence of the institution of marriage. By and large, the theories are still focused on explaining the beginning of changing trends. Less clear is where the transition might end, at what point new behaviors will peak, and when destinies will cease to diverge.

Second, most of the predominant theories posit that, at least to some extent, increasing individualization underlies partnership change. Many of the perspectives address the tension between society and the individual, asserting that individuals are now able to buck social norms and disregard the desires of others. These theories often neglect or disregard the strong pressure of family, friends, and peers to conform. Human beings watch for signifiers of social status, such as engagements and weddings, and consumeristic culture is well-placed to buy into such signifiers. Families continue to have a strong pull on individuals, particularly with the strong influence of cultural norms. The impact of migration, religion, and tradition may keep marriage and childbearing rates higher than would otherwise have been assumed. In addition, individualization neglects the human need for altruism, self-sacrifice, and co-dependence. Members of a couple may not act solely out of self-interest, but instead in the interest of their partner or the good of their family. Indeed, bargaining and exchange, while certainly oriented towards protecting and serving individuals and maintaining gendered positions within society, can be seen as a way for couples to negotiate their needs, both practical and intimate. The overuse of the buzzword individualization, as a shorthand for rejecting traditional norms of the past, tends to neglect the way in which human beings bond with an intimate partner. Thus, theories need to recognize that partnership decisions are not based on one person alone, but the synthesis of two people's joint interactions, often within the context of family, friends, and increasingly, online social networks.

Third, as discussed above, most of the advances in demography and sociology rely on the accrual of empirical evidence rather than development of overarching, grand theories. The grand theories outlined above tend to be those which have been repeated, rehashed, and

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reused, not always reflecting empirical advances. In addition, these theories have been slow to incorporate the rapid social and economic changes of the last few decades. Over the past 15 years, drastic new challenges have emerged: unexpected economic and political uncertainty, the digital revolution, the Covid-19 pandemic, armed conflict, and impending climate change. Theoretical advances have occurred to better understand the role of economic uncertainty and "narratives of the future" on partnership formation (Vignoli and Guetto, Chapter 24). Yet the new uncertainties go beyond the economic and tap into deeper future anxiety. A few empirical studies may be picking up on how these anxieties impact partnerships, for example sexual activity has recently declined in some countries (Burghardt et al., 2020; Lei and South, 2021; Twenge et al., 2017; Wellings et al., 2019). However, we have yet to see how these new uncertainties may have affected young adults' capability of forming and maintaining relationships, and may possibly be leading to the rise of singlehood as a choice.

In conclusion, most high income populations are no longer at the beginning of family and partnership change, but instead well into it. Divorce, cohabitation, partnership dissolution, and living-apart-together relationships have become common, and less in need of explanation. We do need additional research into the correlates and consequences of different family behaviors, and how complex families result in redefined partnership boundaries, but research has already gone far to understand associations with demographic characteristics such as race, ethnicity, and education. Instead, we now need new theories to better understand how emerging global realities are revolutionising partnerships again. Dating apps, social media, online worlds, and the digital revolution are opening up new ways of interacting and relating. Tolerance and acceptance of LGBTQ+ individuals and communities are changing young people's orientations and identities. Singlehood and childfree lives are becoming more normative and desirable. Like society at large, demographic and sociological theories need to continue to innovate in order to keep up with the changing times.

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5. Psychological perspectives on partnering

Esther Kluwer and Tea Trillingsgaard

Partner relationships are at the core of human society and what "makes and breaks" relationships is of critical importance at the societal, community, and individual level of analysis. Extant research in the social and behavioral sciences has shown evidence for spillover effects from the partnership sphere to other life spheres: partner relationships influence individual health and well-being (e.g., Robles et al., 2014), how well children learn and develop (Amato, 2000), and employee performance and economic productivity (Forthofer et al., 1996). For these reasons, a large body of research has attempted to explain and predict relationship quality, with the ultimate goal of preventing distress and partnership dissolution. The resulting *relationship science* has developed over the past four decades to become an interdisciplinary field that covers the formation, maintenance, and dissolution of partner relationships. Psychology is a core discipline in relationship science and has addressed how relationships function and how relationship quality is affected by partner behaviors, interactions, evaluations, and perceptions as well as the personal characteristics, standards and values that partners bring to the relationship (e.g., Joel et al., 2020), situational forces such as outside stressors (e.g., Karney and Neff, 2013), and how relationships develop over time (e.g., Lavner and Bradbury, 2010; Ter Kuile et al., 2021; Williamson and Lavner, 2020). In this chapter, we discuss evolutionary perspectives, attachment theory, interdependence theory, and stress models. Together, these theoretical perspectives contribute with influences on partnering and relationship behaviors that are both more distal and more proximate to the ongoing processes between partners. We then address changes over time within the relationship and how major life events affect such changes (e.g. transition to parenthood).

5.1 PSYCHOLOGICAL THEORIES IN RELATIONSHIP SCIENCE

Relationship science is guided by many theories and models that vary in addressing more distal versus more proximate influences on partnering and relationship behavior. Here we address four theoretical perspectives that have been particularly influential and have laid the foundation of relationship science: evolutionary perspectives (addressing the influence of distal forces of selection on human nature); attachment theory (addressing the influence of early life experiences); interdependence theory (addressing the influence of dyadic interactions); and stress models (addressing contextual influences).

5.1.1 Evolutionary Perspectives on Partnering

Evolutionary psychological perspectives focus on partnering as an adaptive function. This refers to the idea that a species with certain features – such as functional behavior to choose and secure a mate – will acquire an evolutionary advantage in terms of survival and reproduction. From this perspective, the formation of partner relationships serves two primary

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adaptive functions: sexual reproduction and the bonding of partners for the mutual care of offspring (Kenrick and Trost, 2004). Secondary adaptive functions that are served by these primary functions are mutual sharing, protection and social support. Following from these adaptive functions, certain features have become dominant in the population through a process of *sexual selection*, meaning that they have provided an advantage towards successful mating and are therefore more likely to be reproduced in offspring. Sexual selection can occur either because a certain trait is attractive to the opposite sex (*intersexual choice*) or because a trait helps the individual compete with same-sex rivals (*intrasexual competition*; see Kenrick and Trost, 2004).

An important tenet is that men and women face different adaptive problems and thus the sexual selection related to mating behavior differs between sexes. For example, because of *differential parental investment* (Trivers, 1972) – women invest more in offspring than men due to gestation and lactation – women are somewhat more selective about choosing mates and select partners along different dimensions. Women value cues to resource acquisition (i.e., financial capacity, ambition) more than men, because such cues signal the ability to provide for offspring (Buss, 2004). Men value characteristics signaling reproductive capacity (i.e., physical attractiveness, relative youth) more than women, because for men reproduction is limited by access to fertile mates (Buss, 2004; Trivers, 1972). In addition, men are more concerned with ensuring *paternal certainty* – which obviously is not an adaptive problem for women due to gestation – and therefore to gaining access to additional mates (Kenrick and Trost, 2004). Differences in sexual selection explain gender differences in, for example, intrasexual competition (occurring mainly among males; Ainsworth and Maner, 2012), attitudes towards casual sex (women are less eager and more selective; Buss and Schmitt, 1993), and monogamy (polygyny is more prevalent than polyandry; Daly and Wilson, 1983).

Same-sex sexuality presents a paradox for evolutionary theorists as adaptive function is measured by reproductive success. Sexual orientation appears to be moderately heritable and homosexuality is known to have existed for many generations, but it reduces individual reproductive success (Bailey et al., 2016). However, there are several hypotheses outlining how same-sex sexuality can also support reproductive success, and thus explain the small but consistent proportion of non-heterosexual individuals in the population (see Bailey et al., 2016). For example, having non-heterosexual relatives helps people to reproduce more than they otherwise would have, because they provide more support in raising offspring than heterosexual relatives. In addition, sisters of non-heterosexual males tend to be more fertile than other women, balancing out reproductive success.

In sum, according to evolutionary perspectives, partner relationships serve the adaptive function of sexual reproduction and bonding for the care of offspring. This perspective provides distal explanations for partner relationships and explains how partner behavior is shaped by forces that were present in our evolutionary past.

5.1.2 Attachment Theory

Attachment theory has been particularly influential in relationship science. It was initially focused on the infant–caregiver relationship (Bowlby, 1969), but has evolved into one of the dominant models of adult relationships (Finkel et al., 2017). The basic assumption of attachment theory is that human infants depend on the proximity to a caregiver for survival and therefore a behavioral system that functions to maintain this proximity (e.g., crying, smiling,

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following) evolved as an evolutionary adaptation. Adult caregiving is regulated by a complementary behavioral system (e.g., feeding, soothing, caring, cuddling) and both systems align to foster infant–parent bonding and secure offspring survival. These behavioral systems are activated by perceived environmental threat and their functioning depends on, for example, the child's age (see for an overview Hazan and Shaver, 2004).

Infants learn what to expect from attachment figures through repeated interactions with the caregiver(s) and over time these interactions shape the development of mental representations, or *internal working models*, of significant others (i.e., whether they respond to calls for support and protection) and of the self (i.e., whether the self is worthy of support and protection) (Bowlby, 1973). Individual differences in infant working models can be observed and classified into attachment styles, which Ainsworth et al. (1978) classified as *secure*, *anxious-ambivalent*, and *avoidant*. These internal working models are relatively stable and carried forward to influence cognitions, affect, and behavior in subsequent partner relationships (Bowlby, 1973). The theory assumes that the attachment system remains active during the life course, even though adult attachment differs from infant attachment in important ways. For example, adult attachment relationships are focused on partners instead of parents, are reciprocal rather than complementary, and involve the integration of attachment, caregiving and sexual mating (Hazan and Shaver, 2004). In their seminal paper, Hazan and Shaver (1987) confirmed that attachment patterns, similar to those between children and their parents, could be observed among adults in their partner relationships, with roughly 55 percent of adults being securely attached, 20 percent being anxious/ambivalent, and 25 percent being avoidant. Later on, Bartholomew (1990) proposed four categories of attachment in adulthood – *secure*, *anxious*, *avoidant*, and *disorganized* – that varied on two dimensions: low versus high avoidance of intimacy (resulting from variations in whether others are trusted to be responsive) and low versus high anxiety of abandonment (resulting from variations in whether the self is regarded worthy of support and protection). Attachment orientations in adulthood are relatively stable within individuals across time and context, but they can change in response to attachment-relevant events or contexts such as new relationship experiences or therapy (Simpson et al., 2021).

A large body of research has shown that adult attachment security, as opposed to insecurity, contributes to interpersonal processes that promote relationship satisfaction and stability during the formation, consolidation, and maintenance of partner relationships (Mikulincer and Shaver, 2013). In early research, attachment insecurity was found to be associated with poorer relationship outcomes and higher rates of relationship dissolution (Hazan and Shaver, 1987). Later, the ways in which insecure attachment contributes to destructive interpersonal dynamics in situations related to conflict and support have been extensively investigated (Mikulincer and Shaver, 2013; Simpson and Rholes, 2012). A newer line of research now also highlights how healthy interactions within adult partner relationships can counteract partners' concerns related to attachment insecurity (e.g. fear of rejection or abandonment) and function to promote feelings of security and relationship well-being (for review see Overall et al., 2022).

The attachment system is at least partly responsible for how effective we are in getting our innate need for connection and relatedness fulfilled, and when this need is met, partners are motivated to act in a pro-relationship manner and the relationship is generally more satisfying and stable (Patrick et al., 2007). According to self-determination theory (Deci and Ryan, 2000), however, a sense of *autonomy*, in addition to relatedness, is also crucial. This sense of autonomy depends on one's opportunity to make choices and act in ways that are authentic and

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congruent with one's own needs and this promotes well-being and relationship maintenance (Knee et al., 2013; Patrick et al., 2007). In fact, partners are more motivated and capable of relationship maintenance behaviors when they feel related to their partner and, *at the same time*, maintain their sense of autonomy (Kluwer et al., 2020).

In sum, according to attachment theory, cognition, behavior, and affect in adult partners' relationships are guided by the same behavioral system, the attachment system, that ensures bonding between the infant and primary caregiver(s) early in life. It is first and foremost a theory of motivation, because it emphasizes that connection and feelings of security are at the heart of what individuals try to accomplish in their interactions with significant others. How those interactions unfold is central to interdependence theory.

5.1.3 Interdependence Theory

Interdependence, the mutual influence that two people have over each other's outcomes, is the defining feature of any interpersonal relationship (Thibaut and Kelley, 1959), and thus also of partner relationships. A fundamental assumption is that partners evaluate and make decisions about their relationship by analyzing rewards (i.e., any way that being in the relationship fulfills needs and desires) and costs (i.e., any consequence of being in the relationship that prevents partners from fulfilling their needs and desires). The overall outcomes that partners perceive in the relationship will be determined by the rewards minus the costs. The theory further assumes that partners compare their perceived outcomes with a certain standard – the *comparison level* or CL – that represents the outcomes that they expect and feel that they deserve, based on past experiences. Partners are satisfied to the extent that the perceived outcomes in the relationship exceed their CL.

Another main assumption of interdependence theory is that partners compare their perceived relationship outcomes with a second criterion – the *comparison level of alternatives* – that represents the perceptions of potential alternatives to their current relationship (i.e., the outcomes that they would receive by leaving the relationship). Partners are dependent on their current relationship to the extent that the perceived outcomes exceed their comparison level of alternatives. In addition, dependence may vary both in level and mutuality between partners (Rusbult and Van Lange, 2003). For example, in mutually committed relationships, both partners are high in satisfaction and dependence, whereas in abusive relationships the abused partner may be low in satisfaction but high in dependence (Rusbult and Martz, 1995). In general, commitment to the relationship is the sum of both satisfaction and dependency.

Building on interdependence theory, Rusbult (1983) advanced the *investment model of commitment*. Commitment is the internal representation of a long-term orientation, the intention of staying in the relationship for better or worse and it predicts relationship stability (Rusbult et al., 1998). According to the investment model, commitment results not only from relationship satisfaction and the quality of alternatives to the relationship, but also from investments in the relationship. Investments yield the number and magnitude of resources that are linked to the relationship, such as time, self-disclosures, shared possessions, and friends. For example, distressed spouses may maintain the relationship because they have children together or have been together for many years. Accordingly, commitment mediates the association between key relationship features (satisfaction level, size of investments, and the quality of alternatives) and relationship stability. The model has received considerable empirical support from both cross-sectional and longitudinal studies (e.g., Rusbult, 1983; Rusbult and Martz, 1995;

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Rusbult et al., 1998) and predicts quite well how long relationships will last (Le et al., 2010). Levinger's (1976) Barrier model describes similar factors that affect separation: the rewards of the relationship minus the costs (*attraction*), the *alternatives* one possesses, and the *barriers* that prevent one from leaving the relationship.

Importantly, the structure of interdependence also has implications for interactions between partners. That is, each interaction involves outcomes that can be positive to the extent that they fulfill important needs or negative to the extent that they fail to fulfill important needs. Outcomes may involve immediate experiences or experiences that concern the broader or long-term implications of interaction (Rusbult and Van Lange, 2003). For example, when a conflict of interest arises and one partner chooses to sacrifice own interests for the interest of the other, this partner is choosing an unattractive immediate outcome because it serves both partners' well-being or long-term relationship goals. This *transformation of motivation* (acting on broader concerns instead of immediate self-interest) depends on personal dispositions (e.g., pro-sociality), relationship-specific motives (e.g., commitment), and social norms (e.g., display rules) (Rusbult and Van Lange, 2003). As such, interdependence theory explains behavior in situations of conflicting interests between partners. In addition, core processes such as the development of intimacy can also be explained in terms of an interactional process. According to the interpersonal process model of intimacy (Reis and Patrick, 1996), engaging in self-disclosure (i.e., revealing personally relevant information) will, when this is met by partners' responsiveness, result in stronger feelings of intimacy.

In sum, interdependence theory is a comprehensive theory of human interaction that helps to analyze the intra- and interpersonal processes that are relevant to specific interactions and situations in partner relationships. Although interdependence theory applies to any human interaction, there are differences according to relationship type. For example, relationship-specific motives such as commitment and trust may be stronger in partner relationships compared to less intimate relationships (Rusbult and Van Lange, 2003). Also, intimate partners often have a so-called *communal relationship*, meaning that they feel concern for the other's well-being and provide care and support without expecting repayment (Clark and Aragón, 2013). By contrast, in *exchange relationships* (such as work relationships), people do favors for others, expecting comparable benefits in return.

The theories discussed thus far have focused on the influence of our evolutionary past, our early and current life relationship experiences, and on the interactions and interdependencies between partners. However, relationships develop and are maintained in a context that may influence what happens within the relationship. Social ecological models explain how aspects of the environment external to the relationship can be a source of stress, support, and constraint and how such external factors may influence cognitions, affect, and behavior in the relationship.

5.1.4 Stress Models

Several theories and models depart from the proposition that external demands negatively affect relationships when the demands exceed the partners' and couples' resources for coping (Finkel et al., 2017). Demands may involve acute or chronic stressors, such as job loss, financial strain, or chronic illness, but also normative stressors such as the birth of the first child (e.g., Kluwer, 2010). The influential *Vulnerability-Stress-Adaptation Model* (Karney and Bradbury, 1995) assumes that relationship quality and stability is affected by stressors, vulner-

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abilities, and adaptation. Stressors can be stressful events or transitions that require adaptation, and stress affects couples' adaptive processes, such as the ways that partners communicate with, think about, and respond to each other. Pre-existing vulnerabilities that partners bring to the relationship (i.e., aspects of personal history, personality, or psychopathology) contribute to the stressful events and affect how well couples adapt. Others have acknowledged that apart from vulnerabilities, couples also have strengths and resources that buffer the effects of stress on the relationship (McNulty et al., 2021; Slatcher and Selcuk, 2017; Ter Kuile et al., 2021).

To describe how couples cope with stress at the micro-level, as an interdependent process between partners, the concept of *dyadic coping* was introduced (Bodenmann, 1997). Dyadic coping involves the exchange of stress signals of one partner, the verbal or nonverbal coping responses of the other partner, and the couple's joint coping efforts. Dyadic coping may either be problem-focused or emotion-focused and may be expressed in positive ways (through help, support, and understanding) or negative ways (through overprotection, ambivalence, hostility, or disinterest). In some situations, only one partner is stressed, whereas in other situations both partners are stressed either because they face a common stressor (e.g., financial strain, relocation) or because there is a cross-over effect of stress between the partners. Positive dyadic coping is assumed to help partners to cope with the stressor and restore homeostasis in the face of challenges, whereas negative dyadic coping is assumed to reduce adjustment and erode partners' evaluations of each other and the relationship. Indeed, a meta-analysis involving 72 different samples has shown strong evidence for associations between positive dyadic coping with relationship satisfaction and negative dyadic coping with relationship dissatisfaction, with stronger associations for positive dyadic coping (Falconier et al., 2015).

5.1.5 Summary

This section has described four major theories that are central to relationship science. Many other theoretical perspectives have been formulated over the years and they often overlap with or combine elements of these central theories. These theories rely on three broad classes of variables that capture most of the variables that are studied in relationship science: individual differences including human nature (what partners bring to the relationship); interactive processes (what happens between partners in the relationship); and external circumstances (how the context affects the relationship) (Finkel et al., 2017; Joel et al., 2020). However, a fourth theme central to relationship science is how relationships develop and change over time. Relationships are far from static and a key question both in relationship science and in applied practice is why some relationships persevere and others deteriorate and dissolve.

5.2 RELATIONSHIP DEVELOPMENT OVER TIME

To study relationship development over time, many longitudinal studies have been conducted, following couples from early in their relationship (often as newlyweds) up to years thereafter.

A consistent result in this type of research is that, on average, relationship satisfaction declines significantly over time (e.g., Karney and Bradbury, 2020; Williamson and Lavner, 2020; see also in this volume Kanter et al., Chapter 22; Kreyenfeld and Schmauk, Chapter 15). Initially high levels of satisfaction seem to level off as relationships mature. Explanations have focused on declines as the result of changing processes (i.e., gradual disillusionment and the

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emergence of problems and distress) or the result of initial differences in the strength of the relationship (Huston et al., 2001; Lavner et al., 2012). Evidence suggests that both processes may be operating: couples tend to report lower levels of satisfaction as problems accumulate over time and couples with lower initial levels of satisfaction report more marital problems over time (Lavner et al., 2017).

Recent studies using group-based mixed modeling techniques suggest that studying average trends in relationship satisfaction has masked variability among couples. This research has identified distinct satisfaction trajectories among couples and in fact revealed that large groups of couples experience no or minimal decline, whereas small groups experience steeper declines in relationship satisfaction over time (Karney and Bradbury, 2020; Lavner et al., 2012; Ter Kuile et al., 2021; Williamson and Lavner, 2020). Lavner et al. (2012) showed in a large study that initial levels of distress discriminated between groups better than did rates of change in distress. Other studies have shown similar results (e.g., Don and Mickelson, 2014; Ter Kuile et al., 2021). Nevertheless, couples are also likely to change in response to the life events they encounter during the course of their relationship.

Life events have been considered from a stress perspective and from a developmental perspective. From a stress perspective, life events – desired as well as undesired – are viewed as stressors that significantly disturb daily routines (Luhmann et al., 2012). As described earlier, most relationships encounter events during the life course, stemming from inside or outside the relationship, that are stressful and change the course and stability of the relationship. Stressors such as chronic illness (Berg and Upchurch, 2007), unemployment (Amato and Beattie, 2011), infidelity (Kluwer and Karremans, 2009), child birth (e.g., Kluwer, 2010; Trillingsgaard et al., 2014a), and even natural disasters (Cohan and Cole, 2002) can initiate or exacerbate processes that contribute to relationship instability. As proposed by the Vulnerability-Stress-Adaptation model, relationship change during life events results from the interaction of individual vulnerability and external stress. This notion corresponds with the consistent empirical finding that insecure partners (vulnerability) experience lower/more rapid decline of satisfaction (relationship change) in response to the transition to parenthood (life stressor) (Paley et al., 2002; Schoppe-Sullivan et al., 2016; Trillingsgaard et al., 2014b). Couples under stress experience greater risk in their relationships because (1) challenges and demands outside the relationship take time to address and resolve and couples therefore spend less time on relationship maintenance behavior (e.g., sharing thoughts and feelings, engaging in physical intimacy, or sharing leisure time together), and (2) the experience of stress is associated with the way partners behave and treat each other in the relationship (e.g., Danner-Vlaardingerbroek et al., 2013; Neff and Karney, 2017). However, social support can reduce distress (see Kluwer, 2010; Rafaeli and Gleason, 2009), and the structure and composition of partners' social network (i.e., their social embeddedness) may therefore be crucial to adjustment to life transitions.

From a developmental perspective, life events are viewed as *transitions* – a change from one stable mode to another during a restricted period of time – that require adaptation. A relationship transition involves a period of instability and change that occurs as a result of a life event or change marked by shifts in how individuals define themselves, define their relationship and behave towards each other (Brisini et al., 2018). Brisini and colleagues (2018) highlight a number of important transitions couples experience in their relationship that are related to health (i.e., illness, physical ability), parenthood, relocation, job loss or change, informal care for family members, and retirement. These almost universal life events may not always be perceived as a relationship transition. That is, some couples may go through a major event but not

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experience instability and relationship change as a result (Brisini et al., 2018). Interestingly, these may be the couples that adjust relatively easily.

As an example, one of the best documented relationship changes is that, on average, relationship satisfaction declines after the transition to parenthood and there is evidence for increased conflict and decreased sexual satisfaction and intimacy (Kluwer and Johnson, 2007; Mitnick et al., 2009; Twenge et al., 2003; see for reviews Doss and Rhoades, 2017; Kluwer, 2010). However, studies have found significant individual variation around the average change trajectory and identified a number of predictors of this individual variation in relationship change over time (Doss and Rhoades, 2017; Mitnick et al., 2009; Ter Kuile et al., 2017). In addition, there has been emerging evidence for the existence of subgroups of parents that show distinct patterns of change in relationship satisfaction across the transition to parenthood (e.g., Bernardi et al., 2017; Don and Mickelson, 2014; Ter Kuile et al., 2021). These studies have shown that the majority of parents experience only moderate or even no change in their relationship satisfaction, while small subgroups of parents experience large declines. Stable versus declining subgroups differ in prenatal positive relationship processes, such as partner responsiveness and relationship maintenance behaviors (Ter Kuile et al., 2021), and prenatal risk factors such as anxiety, depression, and daily stress (Don and Mickelson, 2014).

5.3 FUTURE DIRECTIONS AND IMPLICATIONS

Over the past decades, relationship science has made great progress in identifying the mechanisms of the formation, maintenance, and dissolution of partner relationships. This has resulted in a multitude of theories and models that address distinct concepts and processes. And while this does justice to the complexity of relationships, there is also a risk of becoming scattered and overly competitive. The field would gain by moving more towards integrating theories and models with a focus on central organizing theories and principles, instead of adding further conceptual, operational, and methodological nuance (e.g., Finkel et al., 2017; Reis, 2007). The theories described in this chapter yield such central principles that many other models align with.

In addition, like other research fields in psychology, relationship science is largely based on samples drawn from Western, Educated, Industrialized, Rich, and Democratic (WEIRD) societies. We often assume that these samples are representative of other populations and societies, but they are not (Henrich et al., 2010). And even within samples drawn from WEIRD societies, lower SES couples and people of color are generally largely underrepresented (e.g., Johnson, 2012). Furthermore, what we know about relationships is largely based on the self-reports of partners' thoughts and feelings about the relationship. Within the tradition of collecting self-report data, improved methodologies contribute to reduce sources of bias such as diary or other intensive experience sampling, longitudinal methods such as multiple wave designs, and dyadic methods with reports from both partners. However, relationship science would gain tremendously by extending research to non-WEIRD samples and the inclusion of methods other than self-reports.

Finally, relationship science, practice, and policy could gain by increasing the exchange of knowledge in the science–practice interface. For example, the finding that the average decline in relationship satisfaction during the transition to parenthood is driven by large declines in a subset of parents at high risk (Ter Kuile et al., 2021) may help to inform the difficult task of

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timing and targeting of efficient interventions to best help couples and parents (Trillingsgaard et al., 2012). Furthermore, it is unclear whether empirically based interventions that have been tested mostly on white middle-class couples apply to couples that face a greater risk of relationship distress and dissolution (e.g., Johnson, 2012). Recent studies indicate that the function of interactions in partner relationships is moderated by social class (Karney and Bradbury, 2020). For example, behavioral withdrawal during conflict communication (a common target for intervention) has been found to be maladaptive for middle class couples but adaptive for low-income couples (Ross et al., 2019). This suggests that both psychological models and interventions need to take the heterogeneity of the societal context into account.

To conclude, towards the end of fully understanding what "makes and breaks" partner relationships, we need solid and empirically supported psychological theories such as those presented in this chapter. Yet we also need to include dynamics at both the community and societal levels. For this reason, there is a large future potential in cross-disciplinary approaches within relationship science to understand partner relationships in diverse contexts and help inform theory, practice, and policy.

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PART II

PARTNERSHIP DIVERSITY

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6. Married and cohabiting partnerships

Nicole Hiekel

Unmarried cohabitation, that is, living together without being married, has become increasingly popular as a precursor or alternative to marriage in both Europe and the United States. However, the linkages between cohabitation and marriage are more complex than a simple "either/or" dichotomy would suggest. Indeed, cohabitation and marriage are fundamentally linked in contemporary societies on both sides of the Atlantic. Consequently, legal marriage can no longer be studied in isolation from trends and patterns in unmarried cohabitation.

This chapter describes how demographic trends concerning marriage and cohabitation have changed over time in Europe and the United States, and the individual behaviors that have contributed to these trends. It examines the similarities and differences between the two relationship types, and highlights the ways in which they are intertwined. The chapter also traces the academic interest in and debate on the emergence of unmarried cohabitation through three narratives: ideational change, economic change, and institutional change. It considers the broad cross-national diversity regarding the social acceptability of unmarried cohabitation and norms about the institution of marriage. Finally, the chapter discusses how cohabitation and marriage shape demographic behavior in these unions differently, thereby contributing to family and population change.

Ultimately, this contribution provides a comprehensive picture of the complex relationship between cohabitation and marriage from a cross-cultural comparative perspective. It offers insights into the implications of changes in union formation patterns for individuals, couples, families, and societies, while also highlighting avenues for future research.

6.1 COHORT TRENDS IN MARRIAGE

Across Europe and the US, the percentage of people ever married has decreased since the 1970s. The US had the highest marriage rate over this period: per 1000 women aged 15 and older, there were 76.5 marriages in 1970 (Lee and Payne, 2010), though this rate had declined by more than 50 percent to 34.8 in 2018 (US Census Bureau, 2018). A similar trend can be observed in European countries, with many reporting record-low marriage rates in 2020 (Eurostat, 2020). While European marriage statistics are limited to the crude marriage rate (i.e., the number of marriages by 1000 persons of the population), the trend in Europe is comparable to that in the US (Eurostat, 2020), with marriage rates declining by 50 percent from 8.0 marriages per 1000 individuals in 1964 (the first year of available data) to 3.2 in 2020. There is considerable cross-national variation: in 2020, certain Central and Eastern European countries had the highest marriage rates (Hungary: 6.9, Latvia: 5.6), similar to those in the US (6.9 in 2017; Centers for Disease Control and Prevention, 2017), while Northern and Western European countries had intermediate marriage rates (Denmark: 4.9, Germany: 4.5, Finland: 4.0, Sweden: 3.6), and Southern European countries had the lowest marriage rates (Portugal: 1.8, Italy: 1.6, Spain: 1.9).

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Two major behavioral patterns are contributing to these trends. First, women and men of the younger birth cohorts are marrying at older ages. The median age at first marriage (i.e., the age at which half of a population experienced first marriage) has increased over time across Europe and in the US. Among women, marriage postponement can be observed starting with the 1950s birth cohorts in Northern Europe, followed by the 1960s cohorts in Western Europe and the 1970s cohorts in Southern and Eastern Europe (Billari and Liefbroer, 2010). Thus, the age at which half of all women born in the 1970s married varied substantially across Europe: it was highest in Northern and Western Europe (around 30 years) and lowest in certain Eastern European countries (between 21 and 24 years). In the US in 2018, this age was 27.8 years for women and 29.8 years for men, or almost two years higher than in 2010 (Manning et al., 2014).

Second, larger shares of the younger birth cohorts are not marrying at all. The shares of women and men who are never married at age 40 have increased across cohorts, suggesting that not all postponed first marriages are recuperated. A full one-third of all women and around 40 percent of all men born in the late 1970s in the Netherlands, Norway, and Sweden were never married at age 40 (Sobotka and Berghammer, 2021). Kalmijn (2013) found that marriage rates declined more among individuals with lower socioeconomic status, whereas Perelli-Harris and Lyons-Amos (2016) concluded that the social, cultural, and economic contexts of the country of residence shape individual marriage patterns more than individual-level socioeconomic capital. Although most Americans still marry (Sassler and Lichter, 2020), marriage postponement has raised concerns about the "retreat from marriage" among younger cohorts (Schoen and Cheng, 2006). In 2008 in the US, the proportion never married in the 35–44 age group was 22 percent among men and 15 percent among women (Lee and Payne, 2010).

With (early and lifelong) marriage losing ground as a standard demographic transition into adulthood, the cultural ideal of marriage as a breadwinner–homemaker arrangement in a nuclear family setting has shifted (Burgess and Cottrell, 1936). Sociologists have argued that spouses place greater emphasis on self-development and individual choice, ultimately adopting a more individualistic perspective on the rewards of marriage (Cherlin, 2004; Hiekel and Wagner, 2020). In this process of social change, marriage as an institution loses significance, while the quest for intimacy, companionship, and love becomes an integral part of self-identity that is pursued in a growing range of partnership contexts (Beck and Beck-Gernsheim, 1994; Giddens, 1992). Indeed, marriage has become less dominant as the preferred setting for committed, long-term relationships (see Kreyenfeld and Schmauk, Chapter 15) or for parenthood and family life (see Mikolai, Chapter 21). Today, alternatives to marriage are more prevalent and more accepted.

In sum, in both Europe and the US, marriage tends to occur at later ages, if at all, and is less permanent today than in the past. Union formation processes can no longer be considered in isolation when studying legal marriage (Sassler and Lichter, 2020). This is because the changes in marriage are closely intertwined with patterns of unmarried cohabitation, as cohabitation has become a prevalent, if not normative part of contemporary union formation processes (Liefbroer and Elzinga, 2012). With the diffusion of cohabitation in Europe and the US, marriage has lost its exclusiveness as the only union type in which people have sexual relationships, build long-term and committed couple relationships, and bear and rear children together.

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6.2 COHORT TRENDS IN UNMARRIED COHABITATION

Changes in marital behavior are closely related to the emergence of new patterns of union formation. In particular, the rising prevalence of cohabiting partnerships – that is, living with an intimate partner without being married – has significantly shaped the demographic family landscape in contemporary Europe (Sobotka and Berghammer, 2021) and the US (Sassler and Lichter, 2020). Scholarly interest in unmarried cohabitation is high, not least because cohabitation shifted rapidly from being a rare to a common experience within a brief period of historical time.

Cohabitation has become an increasingly prevalent and persistent experience in people's life courses. For each subsequent cohort, unmarried cohabitation has become more dominant as the union type chosen at the start of the partnership, thereby replacing direct marriage. Both the onset and the magnitude of the increase in unmarried cohabitation across cohorts have differed between countries. In Western and Northern Europe, the proportion of first unions formed as unmarried cohabitations was already rising sharply among the 1940s birth cohorts, and continued to increase thereafter. In Central and Eastern European countries and in the US, this trend began among the cohorts born after 1971 (Hiekel, 2014) and the 1990s marriage cohorts, respectively (Bumpass and Lu, 2000). Unmarried cohabitation has replaced direct marriage as the standard entry into a partnership in the majority of European countries (Hiekel, 2014). More recently, the share of individuals in the US who ever cohabited has increased rapidly, with two-thirds of women aged 19–44 having cohabited in 2013 (Hemez and Manning, 2017; Kuperberg, 2019; Manning et al., 2014; Smock and Gupta, 2002).

As well as becoming a more common event in the partnership life course, unmarried cohabitation has become increasingly permanent. Measured by its duration, cohabitation has evolved in many countries from being a short-term living arrangement to being a type of union that either turns into marriage or ends in separation over a longer time period. From the 1940s to the 1970s birth cohorts, the median duration of cohabitating unions doubled in many European countries, although the onset and the magnitude of the increase varied considerably. Half of all cohabiters born in the 1970s in Western and Northern European countries stayed in their first cohabiting union about three to four years, compared to between one and two years for their counterparts in Central and Eastern European countries (Hiekel, 2014). In the US, the 1980s birth cohorts cohabited longer, on average, before their union ended in separation or marriage than the 1960s birth cohorts (Mernitz, 2018). However, compared to cohabitations in Europe, cohabitations in the US remain less stable, are of shorter duration, and are less likely to end in marriage (Heuveline and Timberlake, 2004; Musick and Michelmore, 2018).

While trends toward marriage postponement, postponement of union dissolution, and foregoing marriage contribute to the overall increase in the duration of cohabitation, the relative relevance of each of these trends differs across countries. First, cohabiters tend to wait longer before getting married, which increases the overall duration of cohabiting unions. Across European countries and birth cohorts, declines in the proportions of cohabiting unions that are transformed into marriage within five years of starting to live together can be observed (Hiekel, 2014). Among European countries, the declines have been largest in Norway, where only one-quarter of cohabiters born in the 1970s married within five years. In Western European countries, such as Belgium, France, and Germany, the proportion who married within five years was just under 50 percent, whereas the trend toward postponement of marriage was less pronounced among Central and Eastern European cohabiters. A sharp decline in

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the likelihood of marriage among younger cohorts of cohabiters has been reported for the US as well (Guzzo, 2014; Kuo and Raley, 2016; Lamidi et al., 2019).

Second, whereas separation was a very rare cohabitation outcome among the oldest birth cohorts we can study because these cohabiters usually married very soon after starting to live together, the separation of the first cohabiting union has become a more prevalent cohabitation outcome in every subsequent birth cohort across European countries, and especially in Western and Northern European countries: 35 percent (Norway) and 32 percent (Netherlands) of first cohabitations among the 1970s birth cohorts ended in separation within five years. By contrast, the proportion of cohabitations that end in union dissolution remains negligible in Bulgaria and Georgia, where the increase in cohabitation duration is largely due to a growing share of cohabiters of the cohorts born after 1960 neither marrying nor separating within five years of forming a first union (Hiekel, 2014). Analyses providing firm conclusions that are comparable across countries about whether union dissolution is increasingly postponed over the course of cohabiting unions are still lacking for Europe. In the US, a comparison of cohabiters born in the late 1950s and early 1960s with cohabiters born in the early 1980s showed that separation was increasingly postponed until the third year after the start of the union (Mernitz, 2018).

As a result of these trends and patterns in transitions to marriage and separation, the share of cohabiters who did not transition out of a first cohabitation within five years has increased over subsequent birth cohorts in some – but not all – European countries (Hiekel, 2014). Between one-fifth (Eastern European countries, e.g., Lithuania, Romania, Russia) and nearly one-half (Belgium, Norway) of cohabiting unions were still intact after five years. Cohabiting unions tend to be much shorter in the US than in Western Europe. Most of the difference in duration is due to the much higher incidence of separation among US cohabiters, including relative to the share who eventually marry (Sassler and Lichter, 2020).

6.3 UNDERSTANDING THE RISE IN UNMARRIED COHABITATION VIS-À-VIS MARRIAGE

The previous section showed that unmarried cohabitation has become a more common and persistent experience in people's lives over time, and that there is considerable cross-national variation in the onset, magnitude, and pace of change of this trend. The rise and the diversity of unmarried cohabitation have attracted substantial interest in the field of demography. This section traces the research streams that have shaped the academic debate on the rise in unmarried cohabitation: ideational change, economic change, and institutional change.

Ideational change refers to profound shifts in values and attitudes concerning union and family formation. In the Second Demographic Transition (SDT) theory (outlined in detail in Perelli-Harris and Sassler, Chapter 4), the rise in premarital cohabitation was conceptualized as an expression of self-actualization, autonomy, and freedom of choice (Lesthaeghe, 2010). Younger, more secular, and highly educated women and men living in urban areas were seen as being at the vanguard of these ideational shifts, and thus as the most progressive in adopting these behaviors (Billari and Liefbroer, 2010; Surkyn and Lesthaeghe, 2004). Structural societal changes, such as women benefiting from education expansion and greater attachment to the labor market, enabled women to achieve economic independence from their male partners and to improve their bargaining position within partnerships (Becker, 1981). Women's

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increased access to economic resources led to changes in traditional normative expectations about gender and marital roles, and to a shift toward greater gender equality in the balance of power in partnerships (Sayer and Bianchi, 2000). At the onset of the rise in unmarried cohabitation, the benefits of traditional marriage were least evident for the most educated and highest earning women, who responded by becoming the earliest adopters of cohabitation in Western European countries, such as the Netherlands, Austria, France, Belgium, and Germany (Lesthaeghe, 2020). The trend toward cohabitation later spread rapidly through all social strata. This led to a shift in scholarly attention, as researchers sought to explain the heterogeneity of unmarried cohabitation across social groups and countries, and challenged the universality of the SDT narrative.

It has been argued that economic change – particularly growing economic insecurity due to labor market deregulation, globalization, global financial crises, and, most recently, a global economic crisis – has constrained young adults' ability to predict when they might achieve economic stability (Blossfeld et al., 2005; McDonald, 2006). Most prominently, the thesis that cohabitation diffused rapidly as a consequence of economic insecurity has been put forward. It has been observed that individuals respond to the flexibility and mobility demands of contemporary labor markets by choosing cohabitation as a more flexible and reversable living arrangement vis-à-vis marriage. Prolonged education is another coping strategy for reducing economic uncertainty. Scholars have argued that because enrollment in education is perceived as incompatible with the role of a spouse (Blossfeld and Huinink, 1991), marriage is being increasingly postponed (Blossfeld et al., 2005; Kohler et al., 2002; McLanahan, 2004; Sobotka and Toulemon, 2008).

The effects of labor market trends on marriage via cohabitation played out differently in the US. According to Oppenheimer (1988), assortative mating for marriage formation includes the employment prospects of men (and increasingly of women) to a non-negligible extent. Given the greater uncertainty about men's future socioeconomic status at the time of union formation, postponing marriage through unmarried cohabitation may have become a coping strategy to reduce the long-term consequences of suboptimal assortative mating. As such, cohabitation may be considered a "poor man's marriage" for those who do not (yet) meet the economic preconditions of the marital role. In line with this argument, men's unemployment – typically clustered among the least educated – is associated with marriage postponement or forgoing marriage altogether in favor of unmarried cohabitation (Oppenheimer, 2003; Oppenheimer et al., 1997). Thus, cohabiters in the US are twice as likely to be unemployed as their married counterparts (Smock and Manning, 2010). Participants in qualitative studies have reported that economies of scale are a related financial motive for preferring cohabitation over living apart together (Sassler and Miller, 2011). Cohabiting partners can divide rent and bills, rather than paying them twice for different apartments. Increased uncertainty due to changing labor markets also affects young adults with better employment prospects.

Finally, institutional change implies that the institution of marriage is changing from representing a lifelong commitment to a union that could end in legal separation. The shift in social norms associated with the permanency of marriage has been referred to as the "deinstitutionalization of marriage" (Cherlin, 2004; 2020). Increased divorce rates altered the demographic landscape of partnerships and families as radically as increased cohabitation rates. Divorce and cohabitation trends may be driven not only by the cultural and economic shifts outlined earlier in this chapter, but also by the increased prevalence of the "fear of divorce", which leads some individuals to prefer cohabitation over marriage, at least at the start of a union. Thus,

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cohabitation often serves as a testing ground for the relationship before it is institutionalized through marriage. In a seminal qualitative study conducted in various European countries and Australia (Perelli-Harris et al., 2014), Dutch focus group participants indicated that they view cohabitation as a response to increased divorce rates, as they perceive that the consequences of "merely" separating would be less severe than those of divorce (Hiekel and Keizer, 2015). In a similar vein, German study participants expressed a fear of commitment to marriage due to the potential negative consequences of divorce, rendering cohabitation a less consequential, but also less committed alternative to marriage (Klärner, 2012). In the US, the motive of testing the partner for compatibility in order to reduce the risk of a mismatch before moving on to marriage is related to the "fear of divorce". This fear may increase concerns about rushing into marriage without knowing the spouse well enough. Thus, the perception of cohabitation as a "trial marriage" may contribute to the spread of unmarried cohabitation in societies with high divorce rates. In line with this argument, adult children of divorced parents have been found to be more likely to cohabit than to directly marry at the start of a union (Sassler et al., 2009).

6.4 GRASPING THE DIVERSE MEANINGS OF COHABITATION

Cross-national research comparing cohabitation in contexts where the prevalence varies has tended to assign one predominant meaning of cohabitation to a whole country, and to order countries according to stages of diffusion, with cohabitation as a marginal behavior defining the lower bound, and cohabitation and marriage as indistinguishable behaviors defining the upper bound (Heuveline and Timberlake, 2004; Kiernan, 2002). Overlooking the heterogeneity of individuals and the meanings they attach to their cohabiting unions leads to country-specific findings that challenge such typologies. For instance, in the Scandinavian countries, which have been characterized as contexts in which cohabitation and marriage are indistinguishable (Kiernan, 2001), the majority of cohabiters eventually marry their partner (Wiik et al., 2009).

Hiekel et al. (2014b) proposed a typology of meanings of cohabitation based on how cohabiters currently view their union, as defined by self-reported intentions to marry and attitudes toward the institution of marriage. Though sharing the limitation with other typologies, that they identified the meanings assigned to cohabitation based on responses to indirect measures in the absence of direct questions on the reasons for cohabiting, they refrained from taking a retrospective perspective when basing the assigned meaning on observed behavior related to the outcome of the cohabiting union (e.g., union duration, childbearing behavior, marital transitions). Comparing current cohabitation patterns across Europe with data from the early 2000s, Hiekel et al. (2014b) found that most current cohabiters view their union as a transitory stage in the process of getting married. Thus, marriage remains a valued institution and a clear goal in the lives of many cohabiters (with some having firm plans to marry their partner). This finding underlines previous results suggesting that cohabitation is not replacing marriage for the majority of cohabiters, but may have become a new normative step in the process of union formation (Billari and Liefbroer, 2010). A minority of cohabiters have no marital intentions (yet) while facing economic deprivation. This group is particularly large in some Eastern European countries characterized by low social acceptance of cohabitation and low economic prosperity (Hiekel et al., 2014b). About one in five cohabiters in Western and Northern European countries view their union as an alternative to marriage, and hence

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reject the institution of marriage as outdated, and report no marital intentions. Interestingly, Bulgaria stands out, with one-third of cohabiters belonging to this group. In other Eastern and Central European countries, this meaning of cohabitation is less prevalent or is virtually absent (Georgia, Romania). A smaller minority consider marriage irrelevant, with attitudes toward the institution of marriage that are neither positive nor negative, and report no marital intentions. This view is particularly prevalent in Norway, where one in three cohabiters belongs to this group. Hiekel and colleagues also identified a small minority of cohabiters who consider marriage an outdated institution, while still reporting plans to marry. Conformism is particularly prevalent among Georgian and Lithuanian cohabiters, and hence in contexts with low social acceptance of cohabitation.

When cohabitation appeared in the demographic landscape, attempts to grasp its meaning mainly focused on understanding how cohabiters differed from directly married individuals before they entered cohabitation (Axinn and Thornton, 1992; Kiernan, 2001). There is robust cross-national evidence that being younger, not religious, and living in an urban area selects women and men into cohabitation as the first union versus direct marriage (e.g., Berrington and Diamond, 2000). When cohabitation diffused to larger segments of the population, selection into cohabitation became less relevant, and cohabiters became a more diverse group. With scholarly attention shifting toward grasping the heterogeneity of the meanings of cohabitation that co-exist within societies, and how they produce and reproduce new social inequalities (Casper and Bianchi, 2002; Hiekel et al., 2014b), precursors and correlates of cohabitation have increasingly been studied in reference to different types of cohabitation, rather than as an entry into cohabitation in general. Of these socio-demographic characteristics, age and level of education are most closely associated with attaching different meanings to cohabitation. Older cohabiters (often with previous marriage experience) are more likely to view cohabitation as an alternative to marriage (Hiekel, 2014; King and Scott, 2005). The finding that highly educated cohabiters are more likely to view their union as a prelude to marriage (Hiekel, 2014) is in line with research showing that education is positively linked to marriage formation once schooling is completed (Goldstein and Kenney, 2001; Wiik, 2009).

6.5 DIFFERENT MEANINGS, DIFFERENT PATHWAYS?

Research on the outcomes of cohabitation also increasingly acknowledges the diversity of cohabitation, observing that different types of cohabiters are seeking different things from their unions, which, in turn, affects how they design and experience their relationships. We discuss three aspects that touch upon the core dynamics within and the outcomes of unmarried cohabitation over individuals' partnership and life courses.

First, one of the most profound changes in cohabitation patterns and trends is the increase in childbearing within cohabitation. The role of cohabitation in the family system has received considerable scholarly attention that cannot be covered here, but the interested reader is referred to a chapter in the present volume that is dedicated to this subject (see Mikolai, Chapter 21). Childbearing within cohabitation has increased tremendously, and marriage is no longer the only institutional setting in which children are born and raised (Kennedy and Bumpass, 2008; Perelli-Harris et al., 2012; Perelli-Harris et al., 2010). Still, planning to have children and starting a family remains a prominent reason for cohabiters to marry (Moors and Bernhardt, 2009). Hiekel and Castro-Martín (2014) studied variation in the fertility intentions of cohab-

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iters attaching different meanings to their cohabiting unions. They found that across nine European countries, cohabiters' intentions to have a child were closely associated with plans to marry. Hence, cohabiters who anticipated marrying were willing to make relationship-specific investments, such as planning for and having children, to further strengthen their commitment to their partner (Musick, 2007). After having a first birth within cohabitation, the aspiration to marry was less predictive of cohabiters' fertility intentions (Hiekel and Castro-Martín, 2014). European cohabiters varied with regard to their fertility intentions, but not with regard to the strength of the association between their marriage and fertility plans. The authors argued that the cohabitation typology is a useful tool for understanding differences in the fertility intentions of various types of cohabiters in different contextual settings (Hiekel and Castro-Martín, 2014).

Second, managing income and sharing wealth are important aspects of couples' day-to-day practices, and are of policy relevance, because they affect how couples distribute and manage economic resources. Existing research has consistently documented the existence of a "cohabitation–marriage gap" (Vitali and Fraboni, 2022) in resource pooling. Hence, cohabiters are more likely to keep economic resources separate because of a lack of legal protections, social norms, and selection mechanisms. Cohabiters' economic lives are more intertwined when they are living together for a longer period and when they have children together (Hiekel et al., 2014a). Cohabiters who plan to marry, spouses who married after a period of cohabitation, and directly married spouses do not differ from their cohabiting counterparts with regard to their likelihood of keeping income separate (Hiekel et al., 2014a), which suggests that cohabiters change their economic resource pooling practices over the course of their relationships (Lott, 2017).

Third, union dissolution rates are generally higher for cohabiters than for spouses, even when the couple has joint children (Andersson, 2002; Andersson and Philipov, 2002; Berrington, 2001; Heuveline et al., 2003; Jensen and Clausen, 2003; Wu and Musick, 2008). This finding is mainly attributed to selection effects. Potential causal effects, such as a lack of social support, the effect of the marriage ritual, and pressure to stay together, are not yet well understood (Lyngstad and Jalovaara, 2010). The divorce risk of previously cohabiting spouses is another research area of interest. When cohabitation first emerged, there was an intuitive belief that cohabitation can serve as a testing ground to allow partners to assess their compatibility before making a more serious commitment (which is often reported by cohabiters themselves as a motive for cohabiting). Hence, negative partner matches can be "weeded out", leading to greater marital stability among former cohabiters. As cohabitation further diffused, researchers found that the dissolution risk of former cohabiters was higher only in countries where premarital cohabitation was very rare (Liefbroer and Dourleijn, 2006), and that the excess risk of premarital cohabiters turned negative in the most recent marriage cohorts (Hewitt and De Vaus, 2009; Kuperberg, 2019; Manning and Cohen, 2012).

6.6 CONTEMPORARY TRENDS IN COHABITATION INFORMS MARRIAGE RESEARCH IN THE TWENTY-FIRST CENTURY

Cohabitation is a common life experience across Europe, the United States, and beyond. Thus, it is here to stay. Cohabiters are a diverse population with different rationales, plans, and behaviors. Cross-national research on cohabitation antecedents, dynamics, and outcomes

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has provided a more nuanced understanding of the heterogeneity of the cohabiting population, and has developed proven tools for predicting different behaviors associated with the meanings that cohabiters attach to their unions. The progress that has been made in understanding contemporary cohabitation can inform marriage research in the twenty-first century. Current research on marriage dynamics, and particularly on the stability of married unions and future divorce trends, lags behind in identifying the processes underlying marriage formation and dissolution.

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7. Arranged marriage

Keera Allendorf

Arranged marriage is a partnership type of great conceptual significance, laden with ambiguity and even confusion. This chapter provides an overview of the nature and scope of arranged marriage, as well as its significance in scholarly and popular circles. I begin by defining arranged marriage and contrasting it with self-choice marriages. I then locate these practices across time and space on a global scale, while addressing how data and measurement challenges limit our understanding. The rest of the chapter focuses on arranged marriage in India and South Asia more broadly – the region in which such marriages are widespread at the start of the twenty-first century. I describe how marriage practices vary by region, social group, and gender. I also discuss how spouse selection practices changed and blurred into hybridized forms over time. I conclude by describing the longevity and quality of arranged marriages and touching on areas for future research.

7.1 DEFINING ARRANGED MARRIAGE

Arranged marriage is defined by who chooses a spouse. In an arranged marriage it is parents, often with other senior family members, who choose a spouse for their child. This defining feature is typically accompanied by other characteristics. Such marriages usually have swift timelines with little to no interaction between the prospective bride and groom. A couple may meet only once or twice or not at all before marrying – they are expected to form a relationship after marriage. Further, parents' selection is often based on the social and economic standing of the prospective spouse and their family, including their lineage, wealth, ethnicity/caste, and religion. Individual characteristics of the prospective spouse are also considered, such as their age, occupation, domestic skills, and appearance. The bride and groom may also be young. When especially young girls are married, however, they usually start cohabiting with husbands only when they are older (Bloom and Reddy, 1986).

This ideal type of arranged marriage contrasts with self-choice marriage, which has long dominated Northwest Europe and its diaspora in North America and Oceania. While royalty and aristocrats often had arranged marriages, ordinary people in Northwest Europe chose their own spouses (De Moor and Van Zanden, 2010; Macfarlane, 1986; Thornton, 2009). Historically, young people considered the social and economic standing of prospective spouses, but also based their choice on love, attraction, and companionship. Marriage was also preceded by a courtship period in which couples spent time together before deciding to marry. While premarital sex was not widely acceptable, non-trivial numbers of marriages were precipitated by prenuptial pregnancies (Lundh, 2013; Newton, 2014; Wrigley and Schofield, 1981). Parents were often involved in the marriages of their children. For instance, parents introduced prospective spouses and assisted with weddings. It was also customary for young people to ask parents for permission to marry. Individual consent of the bride and groom remained the crucial element of a marriage, however (Bennett, 2019; Newton, 2014). Couples

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could and did marry without parents' consent and a couple's declaration that they were married was sufficient to make it so.

The contrast in these ideal types is illustrated by the marriages of two famous men – one Indian and one British – in the nineteenth century. In 1883, 13-year-old Mohandas Gandhi married Kasturba Kapadia. Gandhi later described how his marriage came about in his autobiography. His description highlights how his parents and other elders decided when and whom he would marry, while he was only vaguely aware of the upcoming event:

> I was told that two girls chosen for me had died in turn and therefore I infer that I was betrothed three times. I have a faint recollection, however, that the third betrothal took place in my seventh year. But I do not recollect having been informed about it. … The elders decided to marry my second brother, … a cousin, … and me, all at the same time. In doing so there was no thought of our welfare, much less of our wishes. … It was only through these [wedding] preparations that we got warning of the coming event. I do not think it meant to me anything more than the prospect of good clothes to wear, drum beating, marriage processions, rich dinners, and a strange girl to play with. (Gandhi, 1927, pp. 7–8)

Forty-five years earlier, in 1838, 29-year-old Charles Darwin wrote a list of the advantages and disadvantages of marriage as he wrestled over the decision to marry. Darwin's list highlights how the decision was his own and that his decision-making turned on how marriage would affect his own life. Darwin viewed companionship as a chief benefit of marriage, while reduced freedom and economic costs were drawbacks. His reasons to marry began:

> Children – (if it please God) – constant companion, who will feel interested in one (a friend in old age), – object to be beloved and played with – better than a dog anyhow – Home, and someone to take care of house… . (Macfarlane, 1986, p. 3)

The reasons not to marry continued:

> Freedom to go where one liked – choice of Society and little of it. Conversation of clever men at clubs – Not forced to visit relatives, and to bend in every trifle – to have the expense and anxiety of children – perhaps quarrelling – loss of time – cannot read in the Evenings… . (Macfarlane, 1986, p. 4)

A few months later Darwin proposed to Emma Wedgwood and they married in January 1839.

Arranged and self-choice marriages are interwoven into the logics of broader family systems. In Hajnal's (1965; 1982) classic typology, the joint household system is reinforced by arranged marriage. In this patrilineal and patrilocal system, a young bride joins the household of her husband after marriage. A marriage represents the incorporation of a daughter-in-law into a pre-existing family and household under the tutelage of her mother-in-law. A bride's future children will also belong primarily to her husband's family. By contrast, in the bilateral household system of Northwest Europe neolocal residence was the norm and marriage signaled formation of a new household. In turn, couples needed the economic means to form a household. Young people often worked as servants in other people's households to earn the means to marry, which served to push up the age at marriage and expose them to potential spouses (Bennett, 2019).

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7.2 ARRANGED MARRIAGE ACROSS TIME AND SPACE

Historical and ethnographic sources suggest arranged marriage was practiced by much of the global population around 1900 (Therborn, 2004). It was dominant in India and China – two places that have long been home to much of the world's population. It was also widespread in the rest of Asia (Applbaum, 1995; Bahramitash and Kazemipour, 2006; Emran et al., 2014; Malhotra, 1991). Arranged marriage was also common in parts of Africa (Cole and Thomas, 2009; Smith, 2001), as well as Southeastern Europe. Marriages were often arranged in much of the Balkans, including Greece and Albania, as well as neighboring Turkey (Gjonça and Thornton, 2019; Kaser, 2008; Tapia and Raftakis, 2022). Northwest Europe and its diaspora are a notable exception. As noted above, arranged marriage was not widespread among ordinary people in Northwest Europe around 1900. Further, while aristocrats had arranged marriages, ordinary people in that region did not practice arranged marriage dating back to at least 1300 (Macfarlane, 1986).

The absence of arranged marriage in the Northwest European past remains a source of contention and confusion in both scholarly and popular circles. Many mistakenly believe arranged marriage was widespread in Northwest Europe until relatively recently. In 2006, 70 percent of respondents in a nationally representative survey of US adults said arranged marriage was more common in England in 1600 than 1800 (Richardson and Allendorf, 2023). Further, 65 percent believed most husbands were chosen by women's parents in colonial North America around the year 1700, while only a third said most colonial women chose their own husbands through a process of courtship. Such beliefs stem in part from influential work by early scholars who looked to non-Western societies in their own time to understand Northwest Europe's past (Thornton, 2001; 2005). Early scholars mistakenly concluded arranged marriage was practiced historically in Northwest Europe because it was common in contemporary India and China. Such approaches also appear in more recent scholarly sources. Notably, Stephanie Coontz's (2005) widely read *Marriage, a History* suggests Northwest Europe transitioned away from arranged marriage some time between the fourteenth and eighteenth centuries. However, the evidence for arranged marriage in the earlier period is based on people from places outside Northwest Europe and European aristocrats (Thornton, 2009, p. 14).

Ambiguity – or disagreement – in the meaning of arranged marriage is also behind the mistaken belief that arranged marriage was common in Northwest Europe. Social scientists usually consider parents choosing a child's spouse as the defining feature of arranged marriage, but others focus on love as the basis of marriage or view any parental involvement as consistent with arranging. For example, historian Barbara Hanawalt (2007, p. 70) declared "many medieval [English] marriages were arranged." Her conclusion appears based on young people taking economic considerations into account when choosing their spouses – rather than marrying solely for love – and parents introducing prospective spouses and negotiating marriage contracts. Hanawalt (2007, p. 71) further emphasized individual consent of the people marrying was essential to medieval English marriage: "an individual had the final choice of marriage partner … what was essential for the validity of a marriage was the 'present consent' of the parties, that is, they said in the present tense that they took each other to be 'my wedded husband' or my 'wedded wife.'" While Hanawalt uses the word "arranged", the practices she describes would not qualify as arranged marriage under a more typical definition.

After 1900, arranged marriage declined in many places where it was previously widespread (Jones, 2010; Therborn, 2004). In East Asia, arranged marriage fell precipitously, virtually

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disappearing in the twentieth century (Applbaum, 1995; Retherford and Ogawa, 2006; Xu and Whyte, 1990; Yan, 2003; Zang, 2008). In China, about a fifth of those born in the 1920s and 30s had arranged marriages (Liu and Mu, 2023). This share declined to nearly zero among those born in the 1990s. The percentage of marriages decided by Taiwanese parents was 62 percent in 1955–1959 and then plummeted to 13 percent by 1980–1984 (Thornton et al., 1994). Similar declines are documented beyond East Asia. In Togo, the share of women who said their family chose their husband fell from 46 percent of those married in the 1960s to 24 percent in the 1980s (Meekers, 1995). More recently, the share of marriages that were arranged declined from about a third in 1980–1995 to about 15 percent in 2006–2011 among ethnic Kyrgyz in Kyrgyzstan (Nedoluzhko and Agadjanian, 2015). Similar declines occurred in Southeast Europe (Kaser, 2008; Tapia and Raftakis, 2022), other parts of Africa (Cole and Thomas, 2009; Smith, 2009), and Asia (Emran et al., 2014; Ghimire et al., 2006; Heaton et al., 2001; Malhotra, 1991; Smith-Hefner, 2005).

At the start of the twenty-first century, it is impossible to rigorously assess the prevalence of arranged marriage at global, regional, and even national levels. Surveys include questions about spouse choice only on an ad hoc basis. Further, many such surveys are representative of localities, rather than national populations. For example, the Vietnam Longitudinal Survey provides estimates for 10 communes around the Red River Delta (Emran et al., 2014) and the Chitwan Valley Family Study gives estimates for the population living in a large valley in south central Nepal (Axinn et al., 2008; Ghimire et al., 2006).

Existing estimates of the prevalence of arranged marriage are also not strictly comparable because they rely on different measures. For example, in the Vietnam Longitudinal Survey, respondents were asked: "Was your spouse chosen by your parents (or your family) or by yourself?" Response options included: (1) arranged solely by parents or family; (2) arranged by parents, but with my approval; (3) chose own spouse, but with approval of family; and (4) chose own spouse without influence of family. The Chitwan Valley Family Study asks: "Who selected your spouse? Your parents/relatives, yourself, or both?" If respondents chose parents/relatives or yourself, they were then asked, "Who had more influence in choosing your spouse?", with response options of parents/relatives, myself, and equally. A much different measure appeared in the China Family Panel Study (Liu and Mu, 2023). The question: "How did you get to know your first spouse?" had eight response options, including "arranged marriage by parents" – the category used by Liu and Mu (2023) – as well as "met on our own at school", "introduced by relatives or friends", and five others.

7.3 ARRANGED MARRIAGE IN CONTEMPORARY SOUTH ASIA

While rigorous global measurement is lacking, one region where arranged marriage is clearly prevalent in the contemporary period is South Asia. The India Human Development Survey provides nationally representative estimates for Indian women. In India, brides' parents chose a husband for their daughter, without her having a say, in 31 percent of marriages occurring from 2000 to 2012 (Allendorf and Pandian, 2016). In 63 percent of marriages, parents gave their daughter a say in their decision or the two generations worked together to choose a husband. Only 6 percent of women married during this period chose their husbands themselves. Parental control did decline over time. In the 1970s, parents chose husbands without

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their daughters' say in half of marriages, which is substantially higher than the 31 percent figure of the 2010s. However, the small share of self-choice marriages suggests daughters are joining, not displacing, parents in arranging marriages.

To my knowledge, national-level estimates are not available for the rest of South Asia. Other studies suggest arranged marriage is widespread in Pakistan and Bangladesh (Marsden, 2007; Peterson et al., 2011; Schuler et al., 2006). In Nepal's Chitwan Valley, arranged marriage has declined substantially, but not disappeared (Axinn et al., 2008; Ghimire et al., 2006). Among those married in 2008–2012, a fifth said parents chose, half chose on their own, and the remaining third chose jointly with parents (Allendorf, 2017; Allendorf and Thornton, 2015). Sri Lanka has long stood out from the rest of South Asia with more flexible marriage practices similar to Southeast Asia, but parental involvement also declined in Sri Lanka in recent decades (De Munck, 1996; Jones, 2010; Malhotra and Tsui, 1996).

7.3.1 Variation in Marriage Practices

The prevalence of arranged marriage varies and maps onto well-known demographic divides within India and South Asia more broadly (Dyson and Moore, 1983; Karve, 1965; Kolenda, 1987). North India has the highest levels of arranged marriage. In the 2000s, brides had no say in the choice of husband in over half of marriages in North India (Allendorf and Pandian, 2016). In South India, by contrast, daughters and parents jointly chose husbands in nearly 90 percent of marriages; both self-choice and strictly arranged marriages were rare in the South. States at the borders of this famous North–South divide, including West Bengal, Orissa, Gujarat, and Maharashtra, have intermediate levels of arranged marriage. Sizable majorities of husbands were jointly chosen by daughters and their husbands, while parents alone chose in about a fifth of marriages. Northeast India stands out as the only place with sizable numbers of self-choice marriages. In this less populated region, over a third of women married in 2000–2012 chose husbands on their own. India's rural/urban divide in marriage is far more muted. Strictly arranged marriages – with parents alone choosing husbands – are only slightly more prevalent in urban areas (Allendorf and Pandian, 2016). Self-choice marriages are also equally rare in rural and urban areas.

Marriage practices also vary across social groups defined by caste/ethnicity and religion. Differences across aggregate groups that can be compared at the national level – comprising upper caste Hindus, other backward castes, Dalits, Adivasis, Muslims, and other religious groups – are relatively small (Allendorf and Pandian, 2016). Adivasis – also known as Scheduled Tribes – stand out with higher levels of self-choice marriages at about 15 percent nationally, while other groups are below a tenth. Sikhs and Christians, as well as Upper Caste Hindus to a lesser extent, also have higher levels of parents and brides choosing jointly, rather than alone. Apart from these differences, however, the extent of arranged marriage is similar across these aggregate groups.

There is important variation by ethnicity and caste (*jati*) at more precise, local levels. Ethnographies document more self-choice marriages and generally more flexible marriage practices in Dalit and Adivasi communities in some Indian localities (Allendorf, 2013; Grover, 2011; Saavala, 2001). Markedly high levels of self-choice marriages in the Northeast are ascribed to longstanding differences in marriage practices of groups living in that area. Many indigenous groups, known collectively as Adivasis in India and Janajati in Nepal, have long histories of young people of different sexes mixing more freely and exercising much more

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autonomy over their marriages (Ahearn, 2001; Gorer, 1967[1938]; Macfarlane, 1976). High levels of self-choice marriage among Janajati populations are also confirmed by the Chitwan Valley Family Study (Allendorf and Thornton, 2015; Ghimire et al., 2006).

The experience of arranged marriage also varies by gender, with parents exercising more control over daughters' marriages than sons' (Allendorf, 2017; 2019; Malhotra, 1991). In other words, men have more influence choosing wives than women have choosing husbands. For example, among women born in rural Java from 1953 to 1960, 56 percent said their parents chose their husband without their approval (Malhotra, 1991). Only 18 percent of the married men born during the same period said the same. More recently, among those married in Nepal's Chitwan Valley in 2008–2012, a third of women and only a tenth of men said parents alone chose their spouse (Allendorf, 2017). To be clear, these gender difference hold even within couples, with brides typically having less choice than the grooms they marry (Jennings, 2014; Nedoluzhko and Agadjanian, 2015). National-level data for Indian men is not available, but ethnographic studies suggest this gender divide applies to India as well (Kaur and Palriwala, 2014; Mody, 2008).

7.3.2 Spouse Selection Criteria and Ambiguities in Arranged Marriage

These gender differences highlight another point of confusion in popular and scholarly understanding. Spouse choice is often conceptualized as a binary characteristic of the marriage or couple. As seen in the ideal types described above, parents of both the bride and the groom choose in an arranged marriage, while both the bride and groom choose each other in a self-choice marriage. In reality, the amount of control an individual has over choosing their spouse is more of a continuum and often differs from that of the person they marry. For instance, a bride may have no say, while the groom negotiated the match with his bride's parents or his parents let him choose her from among a few women they found suitable. Similarly, a couple may wish to marry, but do so only after the bride's parents, but not the groom's, approve the match. Ethnographies emphasize the complex processes that do not fit neatly into a simply binary of arranged versus self-choice (Allendorf, 2013; De Munck, 1996; Fox, 1975; Grover, 2011; Kaur and Palriwala, 2014; Pande, 2015; Reed, 2021). In fact, despite being a common finding, this point is often framed as novel. Such framing points to the conceptual power of the arranged versus self-choice binary. Ethnographers know their predecessors found similar complexities – and even the survey measures described above incorporate some complexity. This complexity is not incorporated into theoretical frameworks and common understanding, however, which likely motivates ethnographers to make the point anew.

In contemporary South Asia, arranged marriages often have other hallmarks of the ideal type described above. Swift timelines in which couples meet only a few days or weeks before marrying, or at the wedding itself, are common. Nearly 90 percent of Indian women whose parents chose their husband met their husband on their wedding day (Allendorf and Pandian, 2016). Of those who jointly chose with their parents, over half met their husband on their wedding day and another fifth met less than a month before marrying. Lengthy premarital relationships and engagements are rare. Ethnographic studies document a growing dating culture in which young women and men mix more and have romantic relationships (Aengst, 2014; Brunson, 2014). Such relationships are often hidden from parents and viewed as youthful entertainment or "timepass", rather than a means of finding a spouse, however (Abraham and Kumar, 1999; Alexander et al., 2006; Osella and Osella, 1998). Many Indian youth still expect

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and prefer arranged marriages. In 2012, 88 percent of girls and 80 percent of boys aged 15–18 interviewed in the India Human Development Survey wanted an arranged marriage (author's calculations).

Arranged marriages also generally follow rules of caste and religious endogamy. In India, only 5 percent of arranged marriages are inter-caste (Allendorf and Pandian, 2016). Notably, this figure applies to marriages in which parents chose the husband without giving their daughter a say, as well as marriages in which the bride and her parents jointly chose. Of the women who chose on their own, 16 percent married a man of a different caste. Thus, a large majority of self-choice marriages are also endogamous, but not universally so. Similarly, in Nepal's Chitwan Valley, 5 percent of arranged marriages in 2008–2012 were inter-caste compared to 42 percent of self-choice marriages (Allendorf and Thornton, 2015).

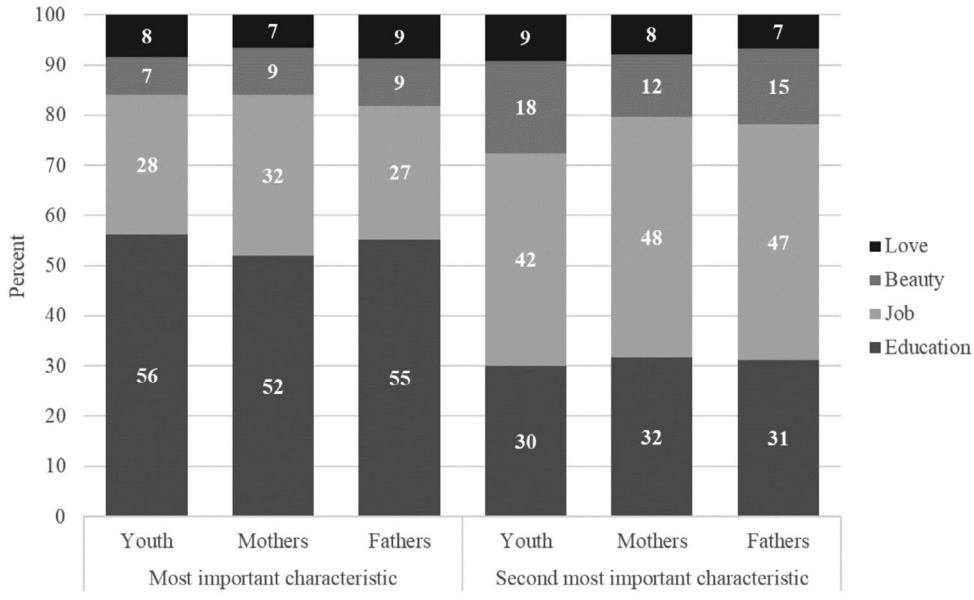
In much of South Asia, inter-caste and inter-religious marriages are widely disliked and the most adverse reactions to elopements occur when the couple are of different castes or religions (Basu, 2015; Chowdhry, 2007; Mody, 2008). Reactions to such marriages include forcible separation, public shaming, ostracism, and murder. Some parents also pursue cases of kidnapping with police and judicial courts against men who elope with their daughters (Basu, 2015; Mody, 2008; Rukmini, 2021). Several Indian states also recently passed ordinances outlawing inter-religious marriages or require special registration of such marriages. These laws were passed in response to concerns about Muslim men converting Hindu women to Islam through marriage, known as "love jihad" (Gupta, 2009).

Criteria for selecting spouses in contemporary arranged marriages also emphasize economic standing, especially for prospective grooms and their families (Allendorf, 2017; Basu and Kumar, 2022). Educated men with remunerative employment are especially prized in the marriage market. Often, wives are expected to care for the home and family after marriage, especially once they have children. Rather than a labor market credential, women's education is valued as a marker of social status and a signal that a woman would be a good companion for an educated husband and raise successful children. Matrimonial ads typically seek slim, fair-skinned homemakers as brides, and financially stable grooms (Dhar, 2022; Rajadesingan et al., 2019; Ramasubramanian and Jain, 2009).

Emphasizing social and economic criteria is not unique to parents, however. The characteristics that unmarried youth value in future spouses resemble those of their parents. In Indian matrimonial websites, 24 percent of profiles posted by people looking for a spouse for themselves were open to a spouse of a different caste compared to 21 percent of profiles posted by parents looking for a spouse for their child (Rajadesingan et al., 2019). This difference of three percentage points was statistically significant, but tiny. Similarly, Still (2011) describes rural, Dalit women looking for husbands on their own because they wanted to marry wealthy, urban residents – men their parents also wanted, but could not provide them. In Nepal's Chitwan Valley, large majorities of never married youth and their parents agreed (high) education and (remunerative) employment are the most important characteristics of a spouse (Allendorf, 2017). Less than a tenth chose love as the most important consideration. Young men were more likely than young women to say love was important, but most men said education and employment were most important (Allendorf, 2017).

Love is part of marriage discussions in contemporary South Asia, but it often intersects with spouse choice in ways that do not match the binary ideal types (Kaur and Palriwala, 2014; Netting, 2009; Uberoi, 2006). The alternative to an arranged marriage is colloquially known as "love marriage", which implies that the alternative to parents choosing one's spouse is mar-

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Source: Author's calculations.

Figure 7.1 *The first and second most important characteristics of a future spouse according to never married youth aged 15 to 24 and their parents in the 2008 Chitwan Valley Family Study*

rying for love. As noted above, however, many young people who choose their own spouses do so based primarily on the same social and economic considerations that parents emphasize. Further, even when young people choose for love – or perhaps more accurately based on attraction – marriages often have the swift timeline of an arranged marriage. Nearly half of Indian women who had self-choice marriages knew their husband for less than a month before they married (Allendorf and Pandian, 2016). Many couples who elope do so after meeting only once or twice (Allendorf, 2013). Other couples elope without meeting in person at all – before marrying they may communicate solely by phone or online. Further, when arranging marriages for their children many parents increasingly take the potential for love and interpersonal compatibility into account (Fuller and Narasimhan, 2008).

More broadly, hybrid marriages that blend South Asian and Northwest European customs are growing in popularity. Such "arranged love marriages", "love-cum-arranged marriages", or "semi-arranged marriages" bring together what many view as positive aspects of both marriage types (Allendorf, 2013; Diamond-Smith et al., 2020; Marsden, 2007; Netting, 2009; Pande, 2015). Such marriages can combine the prestige and family support of an arranged marriage with the youthful autonomy, premarital relationships, and love (or attraction) of self-choice marriage. Such hybrid marriages come about in multiple ways. Many enjoy the honor and ease of choosing from among suitable candidates selected by their parents. Some young couples meet and decide to marry, but approach parents to organize the marriage so it

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appears to be arranged. In other cases, young people openly choose on their own, but limit themselves to partners they know their parents would approve.

7.3.3 Quality and Duration of Arranged Marriages

Many arranged marriages are high quality, with couples achieving the ideal of developing strong, loving relationships after marriage. For instance, in the 2008 Chitwan Valley Family Study, 45 percent of Nepalis whose parents chose their spouse said they loved their spouse very much (author's calculations). This figure is virtually identical to those who chose their spouse on their own (44 percent) and those who chose jointly with parents (43 percent). More rigorous assessments find a mix of non-existent to modest associations between marital quality and spouse choice (Allendorf and Ghimire, 2013; Hoelter et al., 2004). For example, Nepalis with arranged marriages scored a third of a standard deviation lower on marital satisfaction than those who chose their own spouse, but there was no difference in communication (Allendorf and Ghimire, 2013).

Arranged marriages rarely end in separation and divorce. In India, the percentage of ever married adults who were currently divorced or separated was less than one percentage point from 1961 to 2011 (Dommaraju, 2016). More recently, in 2019–2021, only 1.4 percent of women aged 15–49 and 0.9 percent of men aged 15–54 were divorced, separated, or deserted (IIPS and ICF, 2021, p. 216). These strikingly low percentages for current marital status could reflect high rates of remarriage. However, lifetime estimates are also tiny: only 2 percent of Indian marriages end in divorce or separation within 20 years (Dommaraju, 2016).

Marital dissolution is more common in South Asian communities where young people exercise greater choice over spouses. Divorce is universally low across India, but relatively high in Northeastern states where self-choice marriages are most common and higher in Southern states where joint decision-making with parents is dominant (Dommaraju, 2016). Low levels of dissolution reflect the logic of the broader family system in which women's sexuality is tightly controlled and marriages represent continuation of existing families. In contexts where arranged marriage is strongly preferred and practiced, divorce is also highly stigmatized. Family support is also tied to how the marriage came about. Typically, women return to their natal families when marriages break down due to violence or abandonment. Families are responsible for a daughter's future well-being when they arrange her marriage, but if she chooses on her own, she is seen as relinquishing her rights to their future support (Allendorf, 2013).

This strong longevity is not universal, however. Notably, Muslim Southeast Asia provides a striking contrast in which couples in arranged marriages had extremely high rates of divorce in the early twentieth century (Jones, 1997). Parents in that context typically arranged marriages when their children were young, but it was widely acceptable for either spouse to end the marriage later if they were not entirely satisfied. Divorce was also easily accomplished under the Muslim practice of triple talaq (but later became difficult). In turn, as arranged marriage declined over the twentieth century in Muslim Southeast Asia, divorce also fell (Jones, 1997).

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7.4 FUTURE RESEARCH

There is much scope for future research on family involvement in spouse selection and marriage more broadly. Providing better estimates of prevalence by incorporating questions about spouse choice in more surveys would be highly valuable. Even cross-sectional surveys can provide a window into recent changes over time by examining differences across marriage cohorts. Greater standardization of survey measures would also provide comparability across studies. It is also important to continue to explore the complex and shifting process of family involvement in marriage through ethnographies and interview-based studies in a variety of contexts. The growing South Asian diaspora in North America, Europe, and elsewhere is a burgeoning and particularly important context for such investigations. The South Asian diaspora is embedded within populations with different marriage practices, which provides important tests of how and why marriage practices shift and persist. The elite social and economic status of Indians settled in the United States, Great Britain, and other wealthy countries may also make them trendsetters in India and more broadly. Further work on connections between spouse choice and marital quality and dissolution is also needed. Relatively few studies address such links, which are likely to differ over place and time as support for such marriages varies.

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8. LGBTQ+ partnerships

Isabeau Van Acker, Chao Song, Els Elaut and Alexis Dewaele

In recent years, the social visibility of gender and sexual diversity has increased significantly in the Global North (Brown, 2009; Dierckx et al., 2018). This development is accompanied by increased attention for non-heterosexual and non-cisgender individuals in research, law and policies (ILGA Europe, 2023; Sweileh, 2018; Transgender Europe, 2023). Non-heterosexual and non-cisgender individuals are usually grouped under the term "LGBTQ+", an acronym for "lesbian", "gay", "bisexual", "transgender" and "queer/questioning", including other existing gender identities, gender expressions, sexual orientations and romantic orientations within the "+". However, hetero- and cisnormative societal expectations still prevail, especially in intimate relationships. Though many of the factors and processes at play within partnerships of LGBTQ+ people are very similar to heterosexual and cisgender relationships, this group does face unique challenges due to the societal context, which in turn also creates opportunities.

In this chapter, a distinction between gender diversity and sexual orientation diversity is made. In what follows, the partnerships of transgender and gender diverse individuals will be discussed first. The disclosure and co-transition process, dyadic stress theory, and protective factors and relationship maintenance are addressed. The second section focuses on sexual orientation diverse individuals and their intimate relationships. This section elaborates on visibility management, dyadic coping, and fostering resilience in sexual orientation diverse partnerships. Throughout the chapter, boxes are used to illustrate the covered topics. The boxes describe cases inspired by clinical practice, as well as quotes from participants of qualitative research. It is important to note that the authors highlight a (mental) health perspective in this chapter, as most literature currently available is situated in the corresponding disciplinary fields (Sweileh, 2018). Moreover, most of the referenced works originate from specific Global North contexts. It is essential this is considered when interpreting the findings presented.

8.1 INTIMATE RELATIONSHIPS AMONG TRANSGENDER AND GENDER DIVERSE INDIVIDUALS

Within intimate relationships, gender plays a significant role in several areas, such as physical attraction, partner selection and intimacy (Platt and Bolland, 2018). Transgender and gender diverse (TGD) individuals are defined as anybody whose gender identity differs from the assigned gender at birth, typically determined by sex (Bischof et al., 2016). It is important to note that this language is constantly evolving to better represent the experiences of TGD people. If one partner discloses as TGD and possibly transitions, an impact on the other partner(s) and the romantic relationship can be expected (Dierckx et al., 2016; Theron and Collier, 2013). Research has shown that the idea that TGD individuals cannot have a healthy or satisfying intimate relationship is a myth (Fuller and Riggs, 2019). Hence, the development

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of a more nuanced and better fitting view of partnerships of TGD people is necessary. To this aim, the authors present a recent overview of studies on romantic relationships of TGD individuals throughout the life course.

8.2 COMING-OUT

For many LGBTQ+ people, the disclosure of their identity, or "coming-out", is an important milestone. Nevertheless, disclosure often results in an identity not being acknowledged and/or in rejection by people in their environment. When TGD individuals inform their intimate partner(s) about the experienced gender, the partner(s) may experience feelings of confusion, nervousness, sadness, anger, loneliness, fear, disbelief and betrayal. Moreover, a coming-out can raise different questions among partners, for example about their own sexual orientation and gender identity (Theron and Collier, 2013). Partners also report concerns about the future of their relationship, their children and the reactions of others. In contrast to the uncertainty that a coming-out seems to bring for some, other partners indicate they find it courageous of their TGD partner to come out. Partners also express the expectation that a transition will allow growth and a new, hopeful perspective (Dierckx et al., 2018). The disclosure of a TGD person's gender identity can thus be an emotional and intense experience for a partner. Several studies show that coming out can lead to a relationship breakdown, although this does not have to be the case (Meier et al., 2013). Research by Dierckx et al. (2018) shows multiple factors influence whether relationship dissolution occurs, namely the moment of disclosure, the manner of discovery, the pace of the disclosure, the extent to which the TGD partner is perceived as selfish and the general characteristics of the relationship.

Partnerships that maintain their romantic relationship might find a challenge in disclosing their TGD status to both their social and professional environment, as well as in public, as it often feels as if the partner of the TGD person must also 'come out'. Research shows that reactions of people from the social and professional environment vary greatly. The possible loss of important family members or friends and negative reactions and behaviour from others in both private and public situations, can influence how partners approach disclosure (Theron and Collier, 2013). Literature suggests that they carefully plan and continuously monitor when, to whom, and how they disclose the gender identity of the TGD partner. Brown (2009) termed these considerations among TGD individuals and their partners "strategic disclosure".

8.3 CO-TRANSITION

TGD individuals may decide to socially and/or medically transition to decrease gender incongruence. A medical transition refers to all medical procedures that help form a more gender congruent body experience, such as hormone treatment and gender affirming surgery. A social transition can involve the TGD person using a new name, changing the official gender registration, or changes in clothing and appearance. It is important to note that every TGD individual has unique needs when it comes to a gender affirming transition. This results in vastly different transition processes and outcomes. Studies have used the term "co-transition" to indicate that a gender transition is not solely an individual process (Dierckx et al., 2016; Theron and Collier, 2013). When an intimate partner is present, both the partner and the

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romantic relationship experience a process of change, simultaneous with the gender affirming transition (Platt and Bolland, 2018; Van Acker et al., 2023). The limited evidence available further suggests that partners, as well as the relationship, may face unique challenges, and that personal and relational growth can occur during and after this process. What follows is a discussion of the impact of this co-transition process on three main domains, namely the intrapersonal, relational and social domain.

8.3.1 Intrapersonal Impact on the Partner

Partners must reconsider many aspects of their lives as they adjust to their role as a partner of a TGD person (Theron and Collier, 2013). As familiar aspects in the partner might change or even disappear, many partners experience a grieving process in response to (a desire to) transition (Dierckx et al., 2018; Van Acker et al., 2023). After disclosure of the TGD individual, confusion about sexual orientation may arise with the partner (Dierckx et al., 2018; Platt and Bolland, 2018; Theron and Collier, 2013; Van Acker et al., 2023). Some partners face the question of whether the current label for their sexual orientation needs to change and if and how it can be reintegrated into the partner system. Although partners of TGD individuals often seem to experience no change in their sexual attraction (Theron and Collier, 2013; Van Acker et al., 2023), evidence shows that partners sometimes do change the label they use to identify themselves to include their TGD partner (Platt and Bolland, 2018; Van Acker et al., 2023). Though this change in sexual orientation label is mostly reviewed as a positive change by partners (Platt and Bolland, 2018), it can cause distress for partners with a sexual orientation diverse identity (see Box 8.1). A possible reason for this is that they may lose a part of their identity, which was already difficult to establish in the first place (Theron and Collier, 2013). Lastly, a considerable number of partners indicate that they have grown as a person as a result of their partner's transition and that they have experienced a change in their personal world view. Some feel the transition has enriched their lives. Related to this, research finds that a process of acceptance can take place for family members of TGD individuals, including the partner (Van Acker et al., 2023).

BOX 8.1

Karl (45 years old, trans man) and Joan (42 years old, cisgender female partner) together attend a session with a mental health professional in the context of Karl's desire to medically transition. Joan previously lived over ten years in a heterosexual marriage that she ended to be with Karl. As her family found it difficult to accept her in a "lesbian" relationship, the contact with her family deteriorated. While Joan sincerely wants to support Karl's gender journey (and wants him to start the desired hormone therapy), this process is very hard on her: "It is as if all the pain of the divorce that first brought me happiness, now turns into disappointment: would she be heterosexual after all? And, how will my family react to these changes, will they ever trust my judgement again?"

Source: Anonymised clinical case.

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8.3.2 Relational Impact

Although TGD relationships can find a way through transition, for some the unique challenges prove too much to overcome. The results of the study by Meier et al. (2013) among trans men who already had a partner before a medical transition (n = 593) indicate that about half of them remained in the partnership. Of the relationships that dissolved before the end of the transition, half report that the relationship dissolution was related to their medical transition. However, the fact that TGD people can decide to undergo a gender affirming transition at any time in their lives, creates a great variety of situations between relationships. For example, a difference in the timing of gender affirming transitions for trans men and trans women has been found by Scheim and Bauer (2015). They argue that trans men tend to transition earlier than trans women, meaning that trans women are often involved in long-term relationships before informing their partner(s) of their gender identity. Nevertheless, scientific findings support the theory that romantic relationships of TGD individuals can be maintained in the context of a gender transition. Moreover, Kins et al. (2008) found no difference in relationship satisfaction between TGD relationships and heterosexual, cisgender relationships.

The limited research further shows that, within intimate relationships that are maintained, the transition can have a strong impact on the sexual intimacy between partners. Partnerships in transition go through a process of reshaping their sexual intimacy, including exploring the changing body and changing sexual roles. Throughout this evolution, sexual scripts may change and get a new meaning (Brown, 2010; Van Acker et al., 2023) (see Box 8.2). The physical changes brought about by a medical transition can reduce negative feelings due to gender dysphoria in the TGD partner, which in turn can lead to new sexual experiences and an increase in sexual intimacy (Platt and Bolland, 2018). However, these same physical changes can cause reluctance and discomfort in their partners (Dierckx et al., 2018; Platt and Bolland, 2018).

BOX 8.2

Jenny (35 years old, trans woman) and Vincent (cisgender male partner) visit a mental health professional in the context of Jenny's gender affirming medical transition. They have known each other for four years. Two years into the relationship, Jenny started her transition. Initially, the partners explored different sexual scripts. Waiting for a vaginoplasty, they experiment with anal sex, stemming from a desire to experience more closeness through penetrative sex. After a while, however, Jenny finds this sexual script too triggering for her gender incongruence. After vaginoplasty, the penetrative sexual script feels affirming, although the couple continues to look for activities that give them both sexual pleasure.

Source: Anonymised clinical case.

8.3.3 Dyadic Stress Theory

Within the current hetero- and cisnormative society, LGBTQ+ people are often confronted with stigmatisation, discrimination and violence (Burgwal et al., 2023; Dierckx et al., 2018; LeBlanc et al., 2015). According to Meyer's (2003) "minority stress model", the stigmatisation

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and discrimination people belonging to social minority groups experience, creates a high level of stress, "minority stress", which in turn has negative effects on their mental health. Within the framework of the minority stress model, it can be argued that the partners of persons from minority groups can also feel the impact of these minority stressors or can experience them themselves. This is captured by the "dyadic stress theory" (Bolger et al., 1989; Randall and Bodenmann, 2009), which states that the stress people in an intimate relationship experience when confronted with a stressor or the transfer of stress from one partner to the other, can have a negative effect on all partners. The stigma associated with intimate relationships of TGD people is an example of such a stressor and can have an effect on all partners' mental well-being as well as the relationship quality (Meyer, 2003). Platt and Bolland (2018) found that given the high level of stigma and violence against TGD individuals, fear during transition about publicly expressing gender identity is common among partners. Participants in this study indicated that they were concerned about their partner, mainly in terms of safety and the reactions of others. For both TGD individuals and their partners, these daily minority stressors are reported to be difficult (Platt and Bolland, 2018). Even though partners themselves do not belong to a gender minority, the available evidence suggests that the minority stressors present can have an impact on them.

8.4 PROTECTIVE FACTORS AND RELATIONSHIP MAINTENANCE

As illustrated above, partnerships experiencing a gender affirming transition may face a variety of challenges, which require commitment to deal with (Platt, 2020). Scientific studies have identified multiple protective factors and relationship maintenance techniques that partners employ to cope with this. Protective factors include a supportive social environment, peer support and professional support (Dierckx et al., 2016; Twist et al., 2017; Van Acker et al., 2023). Examples of relationship maintenance techniques are unconditional positive regard, non-judgemental acceptance, assertive advocacy, commitment and security, respect, perseverance, friendship, flexibility, honest listening, humour, sexual fluidity, emotional honesty, communication and microaffirmations (Galupo et al., 2018; Marshall et al., 2020; Motter and Softas-Nall, 2020; Platt and Bolland, 2018) (see Box 8.3). These findings mirror those of research on cisgender partnerships, where higher levels of emotional honesty and communication were related to higher feelings of relationship satisfaction (Bello et al., 2008). This shows that, even though partners in transition may encounter unique obstacles, they can find ways to overcome these together.

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BOX 8.3

In the study of Van Acker et al. (2023), Sarah (47 years old, cisgender woman), partnered with Hannah (38 years old, trans woman) for seven years, describes the importance of communication on every aspect of her partner's gender affirming transition: "If someone had a problem, if certain things were about to change or if certain steps were taken, we talked a lot about it. And if you can tell your partner how you feel, the process is actually only half as difficult."

Source: Van Acker et al. (2023).

8.5 INTIMATE RELATIONSHIPS AMONG SEXUAL ORIENTATION DIVERSE INDIVIDUALS

As discussed in the previous section, stigma, prejudice, and discrimination create a hostile and stressful social environment that significantly affects various aspects of the lives of marginalised minority groups, including their mental health, romantic relationships, social networks, and work (LeBlanc et al., 2015; Meyer, 2003; Song et al., 2022a). Minority stress theory also points out that minority stress has significant deleterious effects on sexual minority individuals as well as on sexual orientation diverse partnerships (Bolger et al., 1989; LeBlanc et al., 2015; Randall and Bodenmann, 2009). Sexual orientation diverse relationships refer to intimate relationships in which at least one partner identifies as not exclusively heterosexual (e.g., individuals who feel attracted to same-gender partners).

Past research on sexual orientation diverse partnerships shows the importance of considering not just gender but also gender conformity (e.g., appearance, behaviours, or interests consistent with one's own gender) in understanding relationship and marital processes (Pollitt et al., 2018). Compared to heterosexual relationships, sexual orientation diverse relationships are sometimes characterised by more fluid gender dynamics and scripts, with less emphasis on power disparities between partners as well as greater egalitarianism (Garcia and Umberson, 2019). For example, partners in sexual orientation diverse relationships tend to share more duties and assign various chores based on personal preference, while people in heterosexual partnerships tend to slip back into traditional gender roles. Sexual orientation diverse individuals seem to depart more often from traditional gender roles compared to heterosexual individuals. In the following section, we give an overview of several factors at play within sexual orientation diverse relationships.

8.5.1 Sexual Orientation Visibility Management

Visibility management of sexual orientation refers to an ongoing process by which sexual orientation diverse individuals make careful, planned decisions about whether they will disclose their sexual orientation. It also involves the continuous monitoring of how one presents one's sexual orientation in different environments (Lasser and Tharinger, 2003). The goal is to regulate disclosure to maintain privacy and minimise stigma, harm, or marginalisation (Dewaele et al., 2013; Lasser et al., 2010). Other researchers use comparable concepts such as sexual

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orientation disclosure, openness, outness, coming-out, and concealment (Knoble and Linville, 2012; Legate et al., 2017; Pachankis et al., 2020).

Visibility management strategies are an important component of sexual identity development (Legate et al., 2012), which allows individuals with diverse sexual orientations to develop an authentic and stable sense of self (Ragins, 2004). These strategies go along with both costs and benefits. First, using more restrictive visibility management strategies (i.e., concealing one's sexual orientation) may have a negative impact on individuals' mental health (e.g., depression, anxiety, distress, eating difficulties, substance abuse) (Pachankis et al., 2020) and intimate relationship satisfaction (Song et al., 2022b). Second, using less restrictive visibility management strategies (i.e., being more open about one's sexual orientation) is believed to be beneficial for mental health (Legate et al., 2017) and romantic relational outcomes due to less negative and more positive communication, a stronger relationship engagement, and a higher relationship satisfaction (Barrantes et al., 2017; Reeves and Horne, 2009; Scott et al., 2021). Some qualitative studies also have demonstrated the potential benefits of using less restrictive visibility management strategies for sexual orientation diverse partnerships. Through a qualitative analysis of interviews with 15 same-gender couples, Knoble and Linville (2012) found being open about one's sexual orientation to be a developmental skill, an expression of identity and values, as well as a resilience strategy for managing minority stress.

Less restrictive visibility management strategies could contribute to the creation of a helpful and supportive network for sexual orientation diverse partners. This network can provide crucial social support from family, friends, colleagues, and acquaintances, which can play a significant role in promoting feelings of acceptance among these couples (see Box 8.4). A recent study by Song et al. (2022b) found that this function is more prevalent in female same-sex couples. This could be due to women's self-representations being more dependent on social relationships with significant others, and their self-esteem, self-enhancement, and well-being depending more than those of men on thoughts, feelings, and behaviours that express a connectedness to others (Cross and Madson, 1997). However, some studies have found no association between visibility management strategies and relationship satisfaction in sexual orientation diverse individuals and partnerships (Balsam and Szymanski, 2005; Frost et al., 2022). Overall, visibility management plays a potentially important role in sexual orientation diverse relationships in how they deal with minority stressors, such as experienced discrimination and prejudice. However, the extent to which being open about one's sexual orientation leads to positive outcomes (in terms of relationship satisfaction and mental health) might also depend on the context within which partners find themselves, especially the governmental and political processes on the legalisation of same-sex marriage. For example, when countries legalise same-sex marriage, it sends a powerful message that sexual orientation diverse partnerships are worthy of equal treatment under the law. In such a more LGBTQ+ friendly climate, being open could lead to positive outcomes such as increased social support, whereas in a context where (some) legal rights for sexual minorities are lacking, negative consequences might be predominant.

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BOX 8.4

Talking about social support, one female partner in the study of Knoble and Linville (2012) reported the following:

> I want the same community connection that heterosexuals have. I want people to be glad for us when we're happy, I want them to be there for us when we're having difficult times, I want to be able to talk about our lives. … And if we're not out, we don't have that. (p. 335)

Source: Knoble and Linville (2012).

8.5.2 Dyadic Coping in Sexual Orientation Diverse Partnerships

In addition to visibility management, dyadic coping is also a crucial resource in relationships that encompass sexual orientation diversity. Dyadic coping is one of the key concepts within dyadic stress theory (Bolger et al., 1989; Randall and Bodenmann, 2009). Dyadic stress is conceptualised as a stressful event or encounter that always concerns all partners, either directly when partners are confronted by the same stressful event or when the stress originates inside the couple, or indirectly when the stress of one partner spills over to the partnership and affects all partners. In both cases, dyadic stress elicits joint appraisals and joint coping efforts referred to as dyadic coping (Bodenmann, 2000). A systemic view on stress that assumes that the stress of one partner always has an impact on other partners and on the partnership as a whole, is increasingly shared by theorists and researchers (Randall and Bodenmann, 2009). A systemic–transactional perspective of dyadic coping differentiates between positive (i.e., three types of strategies: supportive, delegated, common) and negative dyadic coping. Supportive dyadic coping describes an individual's efforts to support their stressed partner (i.e., providing practical advice or offering empathic understanding). Delegated dyadic coping means that a partner requests another partner to help them (e.g., one partner explicitly asking another for support and consequently agreeing a new division of tasks). Common dyadic coping refers to a symmetric or complementary involvement like joined problem solving, sharing feelings, establishing mutual commitment, or relaxing together. In contrast to positive dyadic coping, negative dyadic coping means that a partner reacts in an ambivalent, superficial or even hostile way, for example by providing support to their partner but in an unwilling and unmotivated way (Bodenmann, 2005; Bodenmann et al., 2016). Overall, evidence shows that supportive and common dyadic coping positively predicts relationship satisfaction or mental health outcomes whilst delegated and negative dyadic coping negatively predicts relationship satisfaction or mental health outcomes (Karademas, 2021; Meier et al., 2011).

Studies have shown that minority stressors and dyadic stressors have an impact on relationship satisfaction, relationship problems, and even mental health problems (Song et al., 2022a). Dyadic coping may be particularly important as it can buffer the impact of minority stress. Previous research has indicated that men and women in same-gender partnerships are more likely to cope with stress collaboratively than those in opposite-gender partnerships (Wang and Umberson, 2022). Coping behaviours play an important role in building and maintaining romantic relationships, as well as in sustaining mental well-being (Randall et al., 2017a; Song et al., 2020). Song et al. (2020) found that dyadic coping buffered the effect of minority stress on intra-dyadic stress (i.e., issues arising within the relationship itself) within sexual orienta-

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tion diverse couples. Some dyadic studies examine the cross-partner effects of minority stress on same-gender relationships. Dyadic coping proved to be an important strategy for sexual orientation diverse partnerships to lessen the impact of heterosexist microaggressions on one another's internalising symptoms (i.e., anxiety and depression) (Sarno et al., 2021). Studies also found that only those who engaged in low levels of dyadic coping experienced negative psychological outcomes after being confronted with minority stress (Randall et al., 2017a; Randall et al., 2017b). A qualitative interview study showed that positive dyadic coping experiences can contribute to relationship longevity, smooth communication, similarities in values, sharing experiences and a higher relationship commitment (Riggle et al., 2016) (see Box 8.5).

BOX 8.5

The following quote from the study of Riggle et al. (2016) illustrates the beneficial impact of positive dyadic coping on relationship satisfaction:

> Sally, partnered with Jai for 19 years, reported: "One of our biggest things from the beginning was to be very honest and open with each other even in those times when it is tough to spit out those words… to say, you know here's what's going on, or here's what I'm feeling, or here's what I need instead of holding it in and not saying it and letting it build up to something that explodes when it could have been tackled a lot earlier." (p. 325)

Source: Riggle et al. (2016).

8.6 CONCLUSION

The current overview presents a number of relevant factors and processes at play within partnerships of LGBTQ+ people. First, parallel to gender affirmation, partners of TGD individuals can experience a co-transition as well as the intimate relationship. The individual partners and relationship face unique challenges, such as considerations about sexual orientation, redefining sexual intimacy and dyadic stress. Secondly, despite the obstacles TGD partnerships experience, it appears that relational growth, and acceptance of the gender identity and desire to transition by partners is possible. Thirdly, maintaining less restrictive visibility management strategies in sexual orientation diverse partnerships probably has important benefits in terms of mental health and relationship satisfaction provided these individuals find themselves in an LGBTQ+ friendly environment. Health care professionals, such as psychologists, can potentially help distressed sexual orientation diverse partners with exploring how visibility management plays a role in successfully managing stress to improve relationship well-being. Lastly, recent studies emphasise the importance of dyadic coping skills in sexual orientation diverse partnerships. However, research on how relationships evolve across time in terms of dyadic coping and positive or negative relationship outcomes remains scarce. In this context, it is also essential to learn and teach dyadic coping skills to sexual orientation diverse partners, which can be effective both in reducing stress as well as in improving relational and mental well-being. Of course, above all, we should strive for a society in which people are not discriminated or confronted with prejudice because of their gender identity or expression, sexual

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orientation, ethnicity, social class or other characteristics. The first aim above all is to create environments in which diversity is perceived as an asset and a straightforward characteristic of simply being human.

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9. Living apart together

Arnaud Régnier-Loilier

Contemporary transformations of the couple and family paradigms constitute some of the most significant social changes of recent decades, particularly the pluralization of union forms. The norm of the married couple composed of two people of different sexes, a model still dominant in many countries just half a century ago, has gradually ceded ground to consensual unions and, more recently, registered partnerships or civil unions, often supporting the recognition of same-sex couples. The range of couple formation options has widened in conjunction with a three-pronged individual-empowerment movement, in relation to family (influence in choice of spouse has waned), religion (increasingly less of a factor in individual choices), and government (less differentiation between the rights of married and unmarried couples). When it comes to conjugality, individual aspirations, personal development, and emotional fulfilment now take precedence (de Singly, 1996). In this vein, Living Apart Together (LAT) relationships, defined as non-cohabiting couples (a definition that we will discuss in due course), correspond to certain aspects of the "second demographic transition", which entails the spread of "new" family models based on individualization and changing values (Van de Kaa, 1987; Lesthaeghe, 1995).

In this context, LAT relationships are attracting increasing attention from sociologists and demographers, the underlying question being whether they represent a new form of couple that is likely to develop. A number of factors are combining to make non-cohabiting relationships more visible and perhaps more frequent: the rise of individualism, (re)partnering processes repeated throughout the life cycle due to more frequent separations including at advanced ages ("grey divorce"), but also the development of internet dating or mobile apps opening up the possibility of meeting a partner geographically more distant than in the past. Based on quantitative data from the Generations and Gender Surveys (GGS 2004–2010), the share of adults (aged 18–79) in non-cohabiting relationships has reached nearly 10 per cent, although with significant variations from country to country. Overall, it is lower in Eastern Europe (below 5 per cent in Bulgaria, Georgia, Romania and Hungary) than in Northern and Western European countries (between 8 and 10 per cent in Belgium, Germany, France, Norway, Russia) (Liefbroer et al., 2015), in Italy (Régnier-Loilier and Vignoli, 2018) but also in Canada (Turcotte, 2013), Britain (Haskey, 2005) and the United States (Strohm et al., 2009).

However, being involved in a stable intimate relationship covers a wide variety of meanings according to the life-cycle period, between transitory and long-lasting situations, between choice and constraints. Whatever the age, LAT nowadays is part of the landscape and family scholars need to use and define the concept of LAT in order to understand contemporary partnership and family processes. This requires a definition of what LAT actually means. There is no clear, precise definition available, which poses a range of challenges for researchers. In a research perspective, it is important not only to quantify and characterize LATs, but also to examine other aspects such as the need for legal recognition of this type of relationships (Duncan et al., 2012; Lyssens-Danneboom et al., 2013; Navas Navarro, 2016; Bowman, 2020) or the well-being of partners (Lewin, 2017; Oláh et al., 2023; Yucel and Latshaw, 2022).

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The purpose of this chapter is threefold. Based on a—by no means exhaustive—set of papers, the first section highlights some specificities of LATs compared to cohabiting unions and shows the variety of situations covered by the LAT denomination, adopting the point of view of the people concerned (section 9.1). The polysemy of situations is an important issue for the researcher wishing to measure and study the phenomenon. This then leads on to how researchers in the field "make do" with the data (section 9.2). Finally (section 9.3) we will address the prevalence of LATs and how difficult they are to quantify, using data from three French surveys to illustrate the complexity of this exercise.

9.1 LIVING APART TOGETHER: A MULTI-FACETED REALITY

9.1.1 How do LATs Differ from Cohabiting Unions?

Based on cross-sectional data and figures, non-cohabiting relationships are characterized, first, by the fact that they are on average much more recent, suggesting that they are often unions in the process of formation and transitory situations. In 2005 in France, nearly half of stable, non-coresidential intimate relationships had lasted for less than two years (Régnier-Loilier et al., 2009). Similar results are found for Britain in 2011 (Duncan et al., 2014) and Australia (Reimondos et al., 2011). Additionally, French longitudinal data show that after three years, 46 per cent of LAT relationships had ended and 22 per cent of LAT respondents were still LAT with the same partner after three years. In comparison, 94 per cent of those in a cohabiting couple were still living together after three years (Régnier-Loilier, 2016).

However, the future of LAT relationships is highly dependent on age. In older people, LAT relationships are more long-term: while half of 53–79-year-olds are still together and still not cohabiting after three years, this is the case for only 6 per cent of 22–27-year-olds. Moving in with the partner is most frequent in the 22–27 age group (roughly one LAT relationship in two), the age group in which formation of a new union is also the most common (signalling the end of the previous LAT relationship). Conversely, moving in together is particularly rare among the 53–79 age group: fewer than 10 per cent do so after three years (Régnier-Loilier, 2016). Two distinct patterns of living apart together emerge at either end of the age range: among young people, LAT is either a transition to cohabitation, or a couple experiment, often leading to separation and a new relationship, whereas among older people it is a much more sustainable form of coupledom. Giraud (2020) simplifies this dichotomy between young and older non-cohabiting relationships by attributing to the young a desire to "share to build", while the oldest couples are seeking to "share without building".

More generally, in comparison with cohabiting couples, individuals in non-cohabiting relationships are more likely to be young and students. Linked to their specificity in terms of age and length of relationship, LATs are also unions that are rarely formalized (Liefbroer et al., 2015) by marriage or civil union and, unsurprisingly, partners generally manage their budgets separately (in 9 cases out of 10, each has his or her own money, compared with 16 per cent of people in couples living with someone in the same dwelling).[1] It is also only rarely that these unions are fertile: the norm for starting a family is still to have completed one's studies, to have a job and to live in a cohabiting union. However, more often than cohabiting partners, some LATs already have children from a previous union. Other traits also characterize LATs: these

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include, but are not limited to, a higher propensity of LAT at the top of the social hierarchy, in large urban units (Régnier-Loilier, 2018), but also among same-sex couples (Rault, 2018).[2]

9.1.2 Is LAT a Sign of Growing Individualism or a Step in the Conjugal Trajectory?

From a theoretical perspective, some researchers believe that living apart together reflects a greater respect within the couple for each individual's, presumably different, way of living (Charrier and Deroff, 2005). This notion of the couple, which echoes the "pure relationship" described by Giddens (1992) in which the individuals can develop freely and independently, allows distancing within the shared conjugal life to enable each individual to define themselves (Charrier, 2008). In this sense, LAT relationships would be a sign of the "second demographic transition". Liefbroer et al. (2015) reveal an East–West divide that appears to support this idea: the development of LAT relies on the prior existence of alternatives to marriage and the acceptance of cohabitation (Levin and Trost, 1999).

However, the conceptualization of LAT as driven primarily by individualization is nuanced (Funk and Kobayashi, 2016). Rather than being "individualist" in nature, this type of living arrangement is seen as a way of strengthening the relationship and familial bonds, while avoiding the traps of a previous cohabiting union considered restrictive (Levin, 2004; Haskey, 2005; Haskey and Lewis, 2006). Some situations, furthermore, are likely to be due to external constraints. As suggested some thirty years ago, "non-cohabiting conjugality differs in two ways from non-marital cohabitation: it is less likely to be voluntary and it is not meant as any kind of social statement" (Guibert-Lantoine et al., 1994, p. 3).

Other approaches suggest considering LAT as part of the couple-formation process (Duncan and Philips, 2010; Duncan et al., 2013; Duncan et al., 2014; Régnier-Loilier, 2016; 2019). Bergström and Moulin (2022), for example, point out that, in France, while age at first cohabitation has risen over recent generations, age at the start of the relationship has remained stable. What has changed is primarily the form that a first relationship takes in its early stages. Rather, this form of partnership is part of an extended transition-to-adulthood process. Whether they are students or seeking job security, lack of financial independence among young people, often living in the parental home, appears to be delaying cohabitation with a partner (Milan and Peters, 2003). From this point of view, young people cannot really be considered pioneers of change in the family model (Haskey and Lewis, 2006),[3] LAT being for them "mainly a temporary living arrangement and a stage in the union formation process … rather than as an alternative to co-residential union" (Liefbroer et al., 2015, p. 279).

At older ages, the increase in separations is followed by more frequent repartnering, which is also preceded by a phase of dating without living together for varying lengths of time, depending on the individuals' situation (Régnier-Loilier, 2019). At these ages, partners have already built their lives; they have their own homes and may be attached to their habits (their lifestyle, the places they live in and frequent, the way they organize their time, etc.). They are also more likely to have dependent children, limiting their desire to move in with a new partner in order to avoid certain difficulties associated with forming a blended family (prioritizing the children by avoiding the disruption caused by the presence of a step-parent, avoiding potential conflict with the new partner concerning the children's upbringing, or even refusal by a partner to play a parental role). They are also under less pressure to live together: being more financially secure, the economies of scale that can be achieved by living together are less relevant to them; in society's eyes, they have already "proved" their ability to live with someone as

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a couple; and some of them already have children and don't want to have any more: as such, the reproductive norm, which compels couples to live together before having children, does not apply to them.

9.1.3 Varying Profiles of Non-Cohabiting Relationships

The acronym LAT covers a wide range of situations, which is reflected in the frequent use of typologies in scholars. Looking at qualitative data in Norway, Levin (2004) makes a distinction on the basis of intentions and prospects of living together. Five profiles emerge. The first two relate to individuals who would like to live together but who do not, either: (1) because they are responsible for other people, children from a previous union or older parents; or (2) because they work or study in locations that are too far apart for them to cohabit. The three other profiles include people who do not wish to cohabit, either: (3) because they have already lived together under one roof (married or not) and have seen moving out again as the only way to avoid separation; or (4) following a negative experience of conjugal cohabitation that they do not wish to repeat; or, lastly, (5) for older partners, because moving in together would involve certain sacrifices (e.g. choice of furniture, leaving their neighbourhood) and could jeopardize relations with their family. From a similar point of view, Roseneil (2006) identifies three main situations in England: a small group of people who would like to live with their partner, and have already lived together, but whose professional careers are geographically distant (the "regretfully apart"); a group of individuals who do not wish to live together (the "gladly apart"), characterized by people who have been in the relationship for several years and are driven by a strong sense of independence and a determination to control their own lives; and lastly, a group of people who have not yet taken the decision about whether or not to live together (the "undecidedly apart"), who have generally got together relatively recently and are not yet ready or have doubts about the solidity of their relationship.

In a more recent study, Duncan et al. (2013) put forward a typology constructed around the intersection of two dimensions, one comprising "stage" versus "state", and the other "preference" versus "constraint". Four main situations emerge: (1) individuals who cannot live together due to constraints but who perceive the situation to be temporary; (2) those who do not want to cohabit for now but see their relationship as ideally becoming a cohabiting one; (3) those who do not live together due to preference and/or constraint, because of obligations to children from a previous union or a dependent parent, but who might live together in the future; (4) lastly, those who prefer not to cohabit, mostly aged 40 or over, living relatively close to their partner, with whom they have a long-term relationship, and who value autonomy and independence. Finally, we might look at the comparative study between Norway, United Kingdom, Bulgaria, and Portugal conducted by Stoilova et al. (2014), from which five situations emerge: those "living apart as *chosen*"; those "living apart as *temporary*", due to work or legal constraints; those "living apart as *transitional*", whose relationship is more recent; those "living apart as *undecided*", characterized by some uncertainty about the future of the relationship; and, lastly, those "living apart as *unrecognizable*", a more original category compared with those of other typologies, including people for whom living separately is the only way of being together because their relationship must be kept secret (partners who are already married, the stigmatization of certain situations such as homosexuality, or a relationship that would not be approved of by the family).

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Moving on to quantitative data, again, various typologies have been put forward. In France, Villeneuve-Gokalp (1997) distinguished "true couples", referred to as such because they are married and/or have a child together, "couples with external family", when at least one of the partners is married to someone else or has a child from a previous union, and, lastly, "couples without marriage or children", for whom the relationship is generally recent, usually students or young people still living with their parents. In 2009, another typology of people in a "stable intimate relationship" was proposed, this time comprised of four groups (Régnier-Loilier et al., 2009). The first group, "Young adults", includes childless people, mostly never having lived together as a couple. Due to their age (18–24 years), three times out of four, one of the partners is still a student. The second group consists of "single parents", mostly women. The majority of them are between 25 and 54 years old and there are many divorcees. The third group is "seniors", people aged 55 years and over, mostly retired and having already lived together as part of a couple. Widowers are over-represented in this group. Lastly, the final group, "out of a family", includes those aged 25 to 54, most of whom were childless and living independently of their parents. Using the same method and the same survey (GGS), Reimondos et al. (2011) reached an analogous typology for Australia.

9.2 LIVING APART TOGETHER: IN SEARCH OF A DEFINITION FOR A CONCEPT

9.2.1 From a Wide Variety of Individual Situations to the Search of Categorization for the Research

The above elements show that considering oneself as being in a couple when not living together covers, from the point of view of the actors, a diversity of realities which depend on the moment in the life cycle and also in the relation itself. This question is raised repeatedly in the literature, especially in relation to young people with a boyfriend or girlfriend. Haskey (2005), for example, perceives the likelihood that the non-cohabiting relationships described by the youngest "consist of temporary boy or girl friends or partnerships where co-residential living is not a consideration" (p. 43). The situation of young people, which is rather transitory, has little in common with that of older people, for whom the relationship seems more often settled over time. In addition, whether or not individuals feel they are "in a couple" when they do not live with their partner may vary, depending on the progress in the relationship. This is particularly evident when it comes to when the LAT relationship started, which may shift as the relationship develops. Looking at longitudinal data from the French GGS, 16 per cent of individuals who described themselves in 2011 as being in a stable intimate relationship, having described themselves in 2008 as "alone", gave a relationship start date of prior to 2008 (Régnier-Loilier, 2016). Consequently, it seems that people do not always recognize themselves as being in an LAT relationship at the start of the relationship, but may re-categorize it as such in the light of what subsequently happens.

How to define a LAT relationship is a question that has long arisen for researchers (e.g. Levin, 2004; Haskey, 2005; Duncan and Phillips, 2010; Liefbroer et al., 2015; Régnier-Loilier, 2016; Pasteels et al., 2017), indicating that the notion is not self-evident, particularly when they seek to identify its specific features or estimate its prevalence. There are at least three ways in which the uncertainty of what constitutes a LAT relationship emerges from the socio-

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logical and demographic literature: the variation in the definitions used in surveys; the way in which researchers "make do" with the data; and the fact that the research tends to limit itself to one particular age range or to break the analysis down by age group.

9.2.2 Multiple Definitions of a Single Concept

While the acronym LAT[4] appears to have become established in sociology and demography over several decades, it is not familiar in everyday language, with the possible exception of in the Netherlands (Levin, 2004). As such, asking people directly whether they are in a "LAT" relationship would not make sense. However, obtaining a corpus of qualitative interviews or establishing a set of statistics requires a study population to be defined. On the basis of several examples extracted from interviews or questionnaires, a diversity of criteria emerges, indicating that there is no strong consensus on how to approach the phenomenon.

In her qualitative survey of 2004, Levin select her sample on the basis of the following criteria:[5]

> a couple that does not share a home. Each of the two partners lives in his or her own home in which other people might also live. They define themselves as a couple and they perceive that their close surrounding personal network does so as well. The definition requires three conditions: the couple has to agree that they are a couple; others have to see them as such; and they must live in separate homes. This term refers to homosexual as well as heterosexual couples. (Levin, 2004, pp. 226–7)

Despite this precise definition—which may nonetheless be subject to subjective interpretations, especially the fact to "define themselves as a couple"—the inclusion criteria ultimately used by Levin to form her study population appear less clear-cut.[6] For their part, Duncan (2015) and his colleagues selected their qualitative sample from those who responded in the affirmative to the question "Are you currently in a relationship with someone you are not living with here?" in the survey by Omnibus conducted in 2011. These criteria are therefore much broader than those proposed by Levin. Roseneil (2006), on the other hand, interviewed a group of 25–60-year-olds in England who did not live with a partner, without assuming their situation in advance: non-cohabiting couples were then identified through a "relationship mapping exercise" (p. 115). In the American study by Benson and Colman (2016), focusing on those aged 60 and over, the interviewees had to self-identify "as being in an LAT relationship. We defined LAT as any romantic relationship between unmarried individuals who maintained separate homes and identified themselves as a committed couple" (p. 441). Funk and Kobayashi (2016), on the other hand, applied more restrictive criteria:

> To attract couples more likely to view their LAT arrangement as a long-term lifestyle choice rather than a short-term transitional phase (Turcotte, 2013), participating couples were required to be over the age of 25; in a long-term (at least 3 years) "committed romantic relationship" (with an opposite or same-sex partner); reside in the same metropolitan area (either Vancouver or Victoria, Canada); and to self-identify as having chosen to live separately. (p. 1105)

Moving from qualitative interviews to questionnaire-based surveys marks an even more distinct departure, with the impossibility of asking a multi-dimensional question such as those posed by Levin or Funk and Kobayashi. This shift led to less precise questioning with, furthermore, formulations that vary from one survey to the next (Box 9.1) and, usually, no explicit reference to the term "couple". Is saying that you are "in a couple with someone you don't live

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with" the same as being in a "steady relationship"? Does having a "partner" reflect the same reality as having a "regular partner"? How, in practice, was the GGS survey question—which includes the word "couple" but inside parentheses—actually asked? Was this term read by the interviewer? Explicit reference to the term "couple" may actually have considerable importance, given that it is much less inclusive (we will come back to this later on).

BOX 9.1 FORMULATION OF QUESTIONS AIMED AT IDENTIFYING LAT RELATIONSHIPS IN VARIOUS QUANTITATIVE SURVEYS

Without claiming to be comprehensive in any way, here are various examples of ways in which questions to identify LAT relationships have been formulated:

"Do you have a **steady relationship** with a **male or female friend whom you think of as your 'partner'**, even though you are not living together?" (BHPS 1998, Great Britain)

"Do you have a **steady relationship** with someone you are not living with here, **whom you think of as your 'partner'**?" (United Kingdom Household Longitudinal Study, 2012)

"Are you in an **intimate relationship** with someone who lives in a separate household?" (GSS 2001, Canada)

"Do you currently have a **regular partner**?" (ONS 2002–2003, Great Britain)

"Are you currently having an **intimate (couple) relationship** with someone you're not living with? (This may also be your spouse if he/she does not live together with you. Our survey does not only cover heterosexual relationships, but also same-sex relationships. If you have a partner of the same sex, please answer the following questions as well.)" (Generations and Gender Survey, Core Questionnaire 2002, UNECE)

"Are you currently in a **relationship with someone you are not living with here**?" (NatCen Social Research Omnibus, ONS 2011)

"Are you currently in a **couple**? Yes with someone who lives in the household/Yes with someone who lives in another household/No." (EFL Survey 2011; Epic Survey 2013–2014, in France)

9.2.3 The Application of Restrictive Criteria in Quantitative Studies

Given the relatively inclusive questioning used within quantitative surveys, some researchers have tried to apply criteria to hone in on and firm up the concept of LAT. In line with the definition used by Funk and Kobayashi (2016) in their qualitative study (see above), various works have applied specific criteria to the LAT population, such as age, relationship duration, and even reason. De Jong Gierveld (2004), for example, limited her analysis of people aged 55–89 years to those who have chosen to maintain separate households.

The article by Haskey (2005) typifies reflections on the definition of LAT relationships. Seeking to estimate their prevalence, he observed the diverse natures of the relationships

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covered among all respondents aged 16–59 who reported "currently having a regular partner". According to Haskey, the relationships described by adolescents, young people still living with their parents, and even students, are more transitory and the living apart is less voluntary. He proposed different estimates, by limiting the population either to respondents who are also a Household Reference Person or to those who are not a child of the Household Reference Person, or by excluding students. The various resulting estimates are very stable for those aged 35 and over but much more variable in the young. However, Haskey believed that it would be "arbitrary or inappropriate" (p. 43) to exclude those below a certain age.

In subsequent studies, some researchers applied similar criteria with varying cut-off points. Strohm and colleagues (2009), for example, chose to reduce the scope of their study in the United States to those aged 23 and over, on the basis that, prior to this age, too many individuals are still in education to be truly considered living apart together. In their study in Spain, on the other hand, Castro-Martín and colleagues (2008) only considered non-cohabiting relationships of at least 2 years' duration. Régnier-Loilier and Vignoli (2018) "decided to focus on individuals who had been in a LAT relationship for at least 1 year". Nevertheless, these restrictions are somewhat troublesome from a conceptual point of view. To illustrate their debatable character, we might take the example of a researcher who, working on marriage, considers someone married for less than two years as not actually married.

9.2.4 In Support of a Life Course Approach

In contrast with these strategies, which apply restrictive criteria aimed at gaining a better understanding of the LAT couple population, other authors have suggested approaching the issue from a self-reported/subjective perspective, focusing on the plurality of situations covered by the concept. In their study based on GGS survey data (18–79 years), Régnier-Loilier et al. (2009) considered anyone who reported being in a "stable intimate relationship" with someone they do not live with as being in an LAT relationship and proposed a typology of these relationships that partly corresponds to various stages of the life course. Using all GGS data, Pasteels et al. (2017) worked on the premise that LAT relationships should be considered a multi-stage phenomenon on a continuum that goes from (1) dating and (2) dating exclusively, to (3) a committed relationship (with or without the intention of living together), then (4) cohabitation (with or without the intention of getting married), to (5) marriage (with this continuum not being unidirectional). Coulter and Hu (2017) chose not to exclude young people or recent relationships from their study in order to examine the connection with life course circumstances, suggesting that the commitment of couples living separately should be considered an empirical question rather than a matter of definition.

This awareness that LAT relationships include different realities depending on life course position has led some authors to stratify their analyses by age group (Régnier-Loilier and Vignoli, 2018) or to focus on one specific age range: young people (Billari et al., 2008 for example) or, more often, people aged 50 or 60 years and over (De Jong Gierveld, 2004; 2015; Benson and Colman, 2016, for example). Connidis et al. (2017) suggested differentiating "Later Life Living Apart Together" (LLAT) relationships "to emphasize the unique features of LAT in later life" (p. 1411) and highlighted that it is a separate form of coupledom, an "innovative alternative intimate relationship". At the opposite end of the age scale, Bernardi and Oppo (2011) put forward the term "LATAP" to qualify more specifically those "Living Together At Parents' Home", in Southern Italy.

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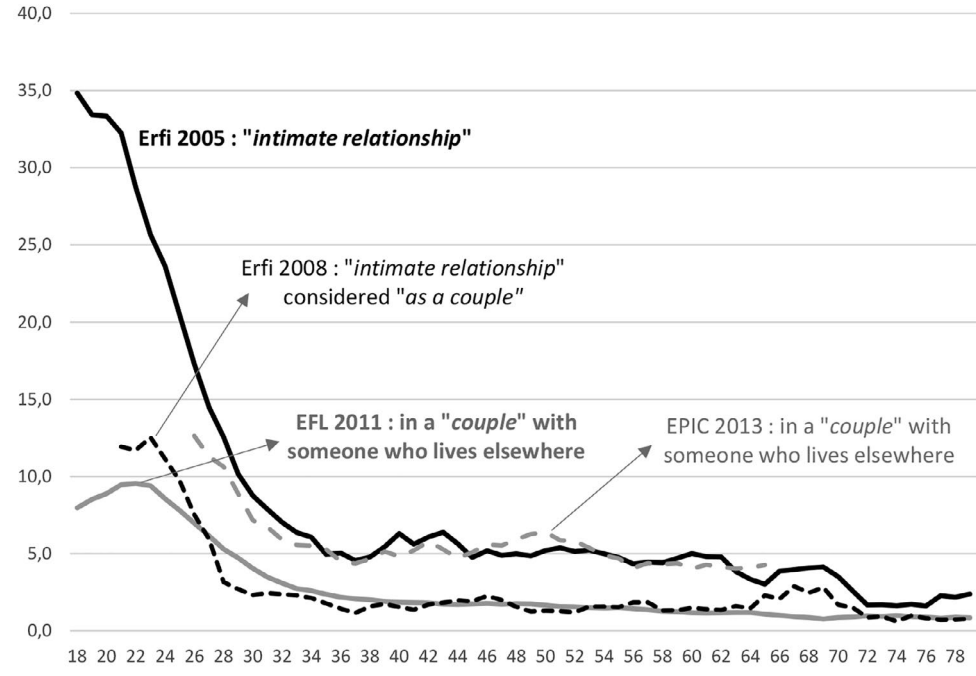
9.3 A DIVERSIFIED PREVALENCE OF LAT IN FRENCH SURVEYS

Generally speaking, the data show that LAT relationships are not negligible in number. However, unlike more established forms of union, such as being married (which relates to a clearly identifiable legal status), the lines between "couple" and "non-couple" relationships are somewhat blurred when we refer to partners who are not living under the same roof. The wording chosen by researchers (boyfriend/girlfriend, partner, companion, spouse, but also stable intimate relationship versus couple relationship) is not neutral on the prevalence of the phenomenon and their meanings can vary between individuals. Haskey (2005) does describe small variations in the quantification of cohabitation depending on the terminology used, but these are nothing compared with the variations observed in what is included under the acronym LAT. Furthermore, the prevalence is sensitive not only to the formulation of the question but also, even with the same formulation, to the context of the survey. To illustrate this, we will focus on three representative national surveys, all conducted in France in the same period but using either differently formulated questions, additional questions, or similar questions (Box 9.2). Based on these data, we can compare the prevalence values obtained, first, based on whether the survey refers to the notion of "stable intimate relationship" or that of non-cohabiting "couple", and, secondly, between different surveys that use the same question.

9.3.1 "Couple" versus "Stable Intimate Relationship". Different Questions, Different Prevalence Values

If we start by looking at differences between the EFL and ÉRFI–GGS surveys, we can see that the former focuses on whether the respondent is "in a couple with someone who lives elsewhere", while the latter focuses on the concept of "stable intimate relationship". Among 18–79-year-olds, the overall prevalence triples when the explicit reference to "couple" is removed: 8.8 per cent of women and men[7] reported being in a "stable intimate relationship", versus 2.9 per cent who reported being "in a couple". This difference can be seen at all ages but is most pronounced before the approximate age of 30 (Figure 9.1).

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Notes: Scope: women and men living in ordinary households; mainland France; weighted data; 5-year moving averages.
Source: ÉRFI–GGS1, INED–INSEE, 2005 (ages 18–79); ÉRFI–GGS2, INED–INSEE, 2008 (ages 21–79); EFL, INSEE, 2011 (ages 18–79); EPIC, INED–INSEE, 2013 (ages 26–65).

Figure 9.1 Percentage of individuals in "LAT" relationship by age in different surveys

BOX 9.2 PRESENTATION OF THREE SURVEYS INCLUDING THE IDENTIFICATION OF LAT RELATIONSHIPS

1. ÉRFI–GGS Longitudinal Survey 2005–2008–2011, INED–INSEE (scope: ages 18–79 years in 2005; n = 10 079 in 2005; n = 6534 in 2008).

   In this face-to-face survey, the question asked during the three waves (2005, 2008 and 2011) was: "Are you currently having a stable intimate relationship with someone you're not living with? This could be your husband/wife, if you are not living together. Yes/No". In 2008, (wave 2, 2008), a further question was added: "Would you define this relationship as more of... 1. a couple relationship; 2. a stable intimate relationship." [a]

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2. Family and Housing Survey (EFL), 2011, INSEE (scope: ages 18 and over; n = 359 669).

   In this self-administered survey, the question asked was "Are you currently in a couple? Yes, with someone who lives in the household; yes, with someone who lives in another household; no, but you have been in a couple in the past; no, you have never been in a couple".

3. Individual and Conjugal Trajectories Survey (EPIC), 2013, INED–INSEE (scope: ages 26–65; n = 7825).

   In this survey, questions were formulated in exactly the same way as in the EFL survey.

Notes: [a] Question only asked in the French GGS.

In the second wave of the ÉRFI–GGS survey (2008), the same question was put to the respondents but a further question was added, asking whether they would consider their relationship as "more of a couple relationship" or as "an intimate relationship": only 35 per cent of 21–79-year-olds identified themselves as being in the first category.[8] Prevalence levels by age among those who considered their relationship to be "a couple" relationship closely matched the prevalence levels observed from the EFL 2011 survey data. As such, the notion of "couple" appears to be markedly more restrictive.

Breaking it down further, people who consider their relationship "as a stable intimate relationship" are younger than those who consider it "a couple" and are more likely to live with their parents. Their relationship is more recent; they are less likely to have already cohabited with their partner and are less likely to intend to do so in the next three years. They are more likely to perceive their situation as "chosen" rather than "constrained" (Régnier-Loilier, 2018).

Same formulation of questions, different prevalence values

While discrepancies in prevalence values are hardly surprising when questions are formulated differently, they are more surprising when the question formulation is absolutely identical. A comparison of the EFL 2011 and EPIC 2013 surveys, both based on the question "Are you in a couple? Yes, with someone living in another household", asked at the start of the questionnaire to avoid any "contextualization" bias associated with previous questions, reveals significant discrepancies (Figure 9.1): the mean prevalence in 25–65-year-olds[9] varies from 2.2 per cent in EFL to 5.7 per cent in EPIC, differences observed at all ages. The EPIC 2013 curve overlaps very closely with that of the ÉRFI-GGS 2005 curve based on the concept of "stable intimate relationship".

These discrepancies may relate to the theme of the surveys and their mode of completion. The EFL questionnaire was self-administered (no interviewer) and family-focused, whereas EPIC, clearly described as relating to intimate and conjugal relationship histories, took place face-to-face. The interviewer was therefore able to clarify the survey, which was aimed at exploring the diversity of union forms. Conversely, the EFL questionnaire was an addition to the annual census survey, in which respondents were asked if they "were living" as part of

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a couple. It is possible that, in an attempt to be consistent, some people who had indicated in the census that they were not "living as part of a couple" also indicated that they were not "in a couple" in the EFL survey, despite having a partner living elsewhere.

9.4 CONCLUSION AND AVENUE FOR FUTURE RESEARCH

Starting from showing the variety of situations experienced by individuals in non-cohabiting relationships, the aim of this chapter was to question researchers' approach to studying LATs and the difficulties involved in understanding them, particularly in quantitative surveys. All the studies agree: LAT is a polymorphous concept. It covers a wide diversity of situations which take on very different meanings depending on when they occur within the individual life course but also within the same relationship. A first avenue for future research could be to encourage a longitudinal approach when it comes to studying LAT relationships, whether prospective in nature (based on the successive waves of the GGS surveys, with a number of persistent difficulties: greater selective attrition in people living alone, stock sampling, etc. (Régnier-Loilier, 2016)), or retrospective (with the inclusion of non-coresident periods in the description of relationship history (Régnier-Loilier, 2019)), in order to approach analysis of LAT relationships in a dynamic and process-focused manner. But this invitation to adopt a life-course perspective is not merely methodological but above all analytical. Following Bergström and Brée's reflections on the single category (2023), we need to acknowledge the instability of the LAT category. To paraphrase the authors cited above, like the single category, LAT "is an experience, not an identity or a community" (p. 16).

For the researchers, this wide diversity of situations is also accompanied by a certain unease when it comes to defining LAT relationships—as evidenced by the variety of definitions and the restrictions sometimes applied to study the phenomenon—and, therefore, identifying and quantifying them. To follow Ayuso's conclusion (2019) about his GGS-based study, this survey "does not begin with a clear concept of the very definition of couple" and a "consensus [could be] needed on what is meant by this type of couple and how it should be measured" for a more precise analysis of the phenomenon. An option could be to base the concept on the notion of "couple" rather than "stable intimate relationship". The French example shows that this narrows things down quite considerably around more committed relationships, but here again, the porosity of boundaries remains great, as evidenced by the variability of prevalence from one survey to another. Another option would be to return to the initial definition proposed by Levin and Trust (1999) and Levin (2004) recalled at the start of the chapter. The first step would be to ask people whether they are in a stable intimate relationship, and then to complete the questioning by asking them whether they consider their relation as "a couple" and whether they feel that friends and family perceive them as a couple (for example, using a graduated scale from "completely" to "not at all"). This would of course need to be tested using a qualitative approach (cognitive interview).

More generally, the use of the acronym "LAT" is questionable. Nowadays, it refers to very different individual situations that are somewhat far removed from its original use. Perhaps this categorization needs to be dispensed with and individuals left to position themselves in various types of situations (for example, being "in a couple with someone living in another household", being "in a stable intimate relationship", having "an ongoing relationship that does not really count", having "occasional relationships that do not really count", or even

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being "neither in a couple, nor in a relationship"[10]). This would provide a more nuanced picture of intimate situations that doesn't isolate relationships that correspond to the researcher's construct of LAT. This construct has been inherited from the very earliest studies on the subject, but the shift towards quantification has largely changed its meaning and content.

NOTES

1. Author's calculation (population: France, 26–65-year-olds in couples; source: Ined-Insee, Epic survey, 2014).
2. The reasons still remain to be explored, from fear of stigmatization to specific representations of the couple and sexuality, etc.
3. Not living with one's partner is not a new phenomenon and used to correspond to a temporary phase prior to marriage, usually dictated by external constraints (Gorer, 1971).
4. The term "LAT" was first used in the Netherlands by a Dutch journalist, in an article published in *Haagse Post* in 1978. For more details on its origin, see Levin (2004).
5. Definition reproduced from a previous study by Levin and Trost (1999).
6. "Sometimes at lectures or presentations, when we had mentioned LAT relationships, people in the audience approached us. We were interviewed in Norwegian and Swedish magazines and newspaper articles in which we solicited people living in LAT relationships to take part in the research. When people asked us about our research and we mentioned the LAT study, some volunteered to be interviewed and others told us about parents, children or friends in LAT relationships" (p. 229).
7. Women and men are grouped together in order to simplify the figure as the gender differences were minimal.
8. The difference seems to be less than it was twenty years ago: in 1994, Villeneuve-Gokalp (1997) showed that those with a regular partner they did not live with were "much more likely to perceive their relationship as a 'stable intimate relationship' (84%) than as a 'conjugal relationship' (16%)" (p. 1067).
9. Scope common to both surveys.
10. The approach used in the French EPIC survey mentioned above.

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10. Polyamory

Tonina Liriel Aurel and Cornelia Schadler

Consensual non-monogamous (CNM) partnerships are becoming more visible, although they are not legally recognized in most western countries (for an overview, see Klesse, 2017; Ossmann, 2020). Polyamorous relationships are diverse and incomparable. It can be, for example, a group of people of all genders in a relationship, reluctant and unable to define the most important partnership in the network that grows and shrinks on a regular basis, a married heterosexual couple that has secondary relationships next to their primary relationship, or a triad that is in a group relationship long term without having relationships outside of this triad. Polyamorous relationships are not new but had, depending on the style of relationships, various names in previous decades and centuries, such as polygamy, open marriage, communes (Rubin, 2001), or chosen family (Weston, 1991). What's new is that, starting in the late 1990s, the name polyamory was established for this specific form of CNM, and a debate began in the community regarding how to characterize polyamorous relationships and with this discussion came a renewed research interest in this form of intimate relationship. The discussion shifted away from group marriage and communes to the multiple ways of living with more than one partner (Barker and Langdridge, 2010b). In this chapter, we will introduce this form of relationship, its (debated) characteristics, its scope, and main research focuses.

10.1 BRIEF HISTORY AND CHARACTERISTICS

The history, definition, and legal recognition of polyamory are three basic issues that will be discussed below. First, while multiple partnership exists all over the world, in the literature, polyamory is a topic of the global north (Mackie, 2017). Therefore, also the literature focuses on relationship styles established in these regions and excludes literature on polygamous relationships existing in the global south. In rare cases research on polygamy from the global north is included in the debate (Bennion and Fishbayn Joffe, 2016). Second, the discussion is rooted within several, partly unrelated, histories, which also results in a variety of definitions of polyamory. Non-monogamous relationships were long discussed in the literature under the umbrella of "alternative lifestyles", focusing on mostly heterosexual couples that do not fit in the traditional forms of relationship, such as triads, living in communes, and swinging (Rubin, 2001). A second community and strand of literature referred to themselves as chosen families and queer kinship, focusing on forms of intimacy and kinship ties between non-biologically related family members, foregrounding mutual care outside of traditional concepts of family (Weston, 1991). Also, monogamy was challenged in the feminist discussion for almost a century (de Beauvoir, 1949; Goldmann, 1931). These, partly non-related discussions are still visible in the current debate around non-monogamy in the research literature as well as in community discussion. This results in research that focuses on non-monogamy as in non-exclusive sexuality and non-monogamy as in ties of intimacy, because many of these former mentioned communities and relationships are now subsumed under the umbrella of polyamory and CNM.

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This has also resulted in partly separate strings of debate and the rise of various communities using the term "polyamorous".

Starting in the 1990s the term "polyamory" emerged for people that pursue multiple intimate relationships with more than one partner at the same time. The introduction of the term in the early 1990s is often attributed to Morning Glory Zell-Ravenheart (Cardoso et al., 2021; Klesse, 2019; Pieper and Bauer, 2014; Schippers, 2020) and Jennifer Wesp (Barker, 2005; Cascais and Cardoso, 2013). The term was slowly picked up by straight and queer non-monogamous people and is now a standard notion for consensual non-monogamous relationships of various kinds. Following the diverse history of non-monogamous lifestyles that are now subsumed under the umbrella term "polyamory", the definitions of polyamorous relationships are diverging. There are several often contradicting definitions of the term "polyamory" (Ossmann, 2020; Pallotta-Chiarolli, 2010). In scientific literature, the notion of polyamory is often specified by its word origin: "poly" (Gr. = many) and "amor" (Lat. = love) (Klesse, 2006; 2011; Pieper and Bauer, 2014). The definition that is most often referred to in research is from Haritaworn et al. (2006), which postulated that polyamory is about the possibility of having predominantly long-lasting intimate and sexual relationships with multiple partners at the same time. Other definitions are very diverse regarding the degree of transparency between partners, their sexual involvement, and emotional intimacy (Anapol, 2010; Barker and Langdridge, 2010b; Ossmann, 2020; Pallotta-Chiarolli, 2010). Klesse (2005) also sees great diversity in the degree of closeness of partners, the number of partners, sexual/social identities, the type of arrangement, legal status, gender constellations, housing and household forms, as well as parenthood styles.

To give a few examples of the spectrum of definitions: some define polyamory by multiple long-lasting partnerships (Sheff, 2020), others also include open partnerships that allow for short-term sexual encounters with other people (Pieper and Bauer, 2014). Some exclude such practices known as "swinging" (couples exchanging partners for sexual encounters) (Barker and Langdridge, 2010b; Bennion, 2022), while some include them (de Visser and McDonald, 2007; Rubin, 2001). Some definitions include romance (love) and sexuality as the core of polyamorous relationships (Anapol, 2010; Barker, 2011), while other definitions criticize this pairing of properties (which excludes aromantic and asexual people) and focus on intimacy (Schippers, 2020). In addition, there are also people who call themselves polyamorous even though they live in a monogamous relationship but consider themselves non-exclusive (Mayer, 2011). What all definitions have in common is that polyamory is about multiple people and that all these people know about and agree with the polyamorous lifestyle (cf. Cardoso et al., 2021; Klesse, 2011; Mayer, 2011; Ossmann, 2020; Pallotta-Chiarolli, 2010; Pieper and Bauer, 2014; Raab, 2018; Santos, 2019; Schippers, 2020; Sheff, 2020; Sheff and Tesene, 2015; Taoemino, 2008). There is agreement in the academic literature that polyamory should be distinguished from cheating in the traditional sense of sexual infidelity (Klesse, 2006; 2011; Ossmann, 2020; Sheff, 2016; 2020). Hence, the non-monogamy between the partners has to be consensual. However, there is also disagreement in the academic literature as to whether polyamory is a synonym for consensual non-monogamy (CNM) (Bennion, 2022; Mayer, 2020; Pieper and Bauer, 2014; Raab, 2018) or whether polyamory is a variation of CNM (Sheff, 2020; Sheff and Tesene, 2015). However, a possible reduced definition of polyamory is: relationships between more than two people that consensually agree about non-monogamy and live and/or self-define as polyamorous.

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In addition to the subtle differences of the definitions just outlined, polyamory is also defined as a relationship practice (Oxford English Dictionary, 2019), a discourse where the boundaries between friendship and partnership are blurred (Domínguez et al., 2017; Moultrie, 2018), a relationship philosophy (Haritaworn et al., 2006; Klesse, 2007; 2011), a relationship orientation (Barker, 2005), or an identity (Benson, 2017; Cascais and Cardoso, 2013; Raab, 2018; Robinson, 2013; Rubinsky, 2018; Table et al., 2017).

Third, after establishing polyamory as a topic of the global north with diverse roots and definitions, there is a lack of legal recognition. In most countries of the global north, there is no legal representation of polyamory in the form of group marriage or multi-parent custody. However, the community is also indecisive if a legal representation is necessary and desirable (Abraham, 2017; Aviram, 2008; Rhoten et al., 2021) because, on the one hand, it would provide access to resources, such as health insurance for spouses, sharing financial resources more easily, legal custody of children, or access to facilitated inheritance regulations (Perez Navarro, 2016; Rhoten et al., 2021; Sheff, 2011), but, on the other hand, it would also establish a specific definition of polyamory as a norm (e.g. a specific number of people or a specific characteristic of relationship) (Aviram, 2008; Klesse, 2016). The states of California and Massachusetts have taken steps towards legally recognizing multiple partnerships concerning visitation rights, ownership, and custody of children but have not provided a foundation for a legal representation of polyamorous relationships (Rhoten et al., 2021). However, activists and scholars are working towards a legal argumentation for a so-called plural marriage (Otter, 2015), for example by framing multi-partner relationships as a sexual orientation in order to gain access to legal rights through litigation (Klesse, 2016). Activists walk on pathways that have been used by advocates for same-sex marriage (Aviram, 2008; Klesse, 2016; Rhoten et al., 2021). We conclude that because the definition of multi-partnership relationships is much harder than same-sex relationships for example, it will be much harder to find legal representation for all the above-mentioned styles of polyamory, but the growing visibility of this relationship will call for creative pathways to legal recognition.

10.2 EVERYDAY LIFE

In polyamorous everyday life, a certain etiquette concerning the core themes of communication, commitment, intimacy, love, and certain values is seen as crucial, such as consensus, integrity, honesty, appreciation, self-knowledge and self-control (Klesse, 2006). In this context, the focus is on not having secrets and barriers in relationships and establishing a continuous renegotiation of boundaries. In the context of polyamory, there is a lot to organize and negotiate on a daily basis, which is why commitments are made to obtain mutual consent (Klesse, 2011). Negotiation communication is therefore a fundamental part of polyamorous everyday life and happens both in face-to-face conversations and in digital form such as emails or text messages (Schadler and Villa, 2016). This is why comprehensive, honest communication is often seen as the secret to success in polyamorous relationships (Ossmann, 2020). However, commitments should also be seen critically because they are associated with restrictions and take away some of polyamory's claimed freedom (Klesse, 2011). Major limited resources in polyamorous relationships are time and attention (Ossmann, 2020; Schadler and Villa, 2016), and therefore it is important to organize these resources well. All relationship members have to negotiate their time between jobs, their polyamorous relationships, and between other

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family members and friends. We share three examples from our data (Aurel, 2021; Schadler, 2021): a polyamorous group including people of all genders, who all have additional short and long-term relationships (relationship A); a married heterosexual couple with long-term secondary partners, whom they meet on a regular basis (relationship B); and a triad who live in the same household (relationship C).

Example A: The people of relationship A live scattered all over a town, and some also live at a longer commuting distance from the specific town. In order to communicate, they established an online group and an online calendar that organizes the time of all group members. If possible, all members meet on a regular basis to discuss the division of their time and their relationship. They decide who spends time with whom (in a group, as couples, alone), the division of tasks (household chores, care for children, researching tasks), how they will communicate in the future and their personal lives and relationships. It is important to all members that they have the freedom to date new potential short- or long-term partners on a regular basis and that the schedule makes time for that. The members do not share income or property, but some occasionally contribute a bit more financially because they have higher-paying jobs. This group demands that all relationship members make plans and stick to them. It is also crucial for all members to be able to communicate their needs and boundaries.

Example B: In relationship B, the secondary partners of the married couple have specific relationship days. On Tuesdays and Thursdays the couple spend the evening and the night with their secondary partners. Occasionally, a Saturday or Sunday is added to the schedule, usually well planned and negotiated with the primary partner beforehand. In this partnership, it is crucial for the members that everybody sticks to the routine and that the hierarchy of the relationships is honoured. The married couple share economic resources, such as income and property, but the partners do not share resources with their secondary partners.

Example C: The people of relationship C have lived in the same apartment for a long time. They share a routine, and the division of tasks and time was established a long time ago and is seldom up for debate. They sleep in the same (over-sized) bed, go their separate ways during the day and meet again at night for dinner. They share their belongings and their income and are committed to care for each other long-term, which they deem crucial for their relationship. In these relationships, it is crucial that all three members do not establish any intimate relationships outside of this triad, because this would disrupt the established routine and everyday life.

In these three stories of everyday lives, it again becomes clear how different polyamorous relationships and their everyday lives are. Many also claim that there are no predefined roles and models for polyamorous relationships. As the three examples show, the various aspects of polyamorous relationships often apply, but not always. It may be a burden to find and establish roles and routines, but it is also a major resource of perceived freedom and happiness. In summary, our data show (Aurel, 2021; Schadler, 2021) that polycules that reject hierarchization differ significantly in terms of their organization and the distribution of resources from hierarchical polyamorous relationships with the division into primary and secondary partners. In primary partnerships, there is often a shared living space, financial resources are structured together and directional decisions are made jointly. Secondary partners, on the other hand, usually live in a separate living space, manage their finances independently, often have other partners, and are rarely involved in directional decision-making. In these hierarchized forms of polyamory, parenthood is usually only entered into with primary partners. In polycules that reject hierarchization, attempts are often made to create a shared living space. In this, all partners have their own area, which is adjacent to the common space, and spatial proximity is

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given. The partners in non-hierarchical relationships support each other and often formulate rules for sharing available resources. For example, if a person in the non-hierarchical polycule falls ill, the other partners support them and agree together on how they can best be there for this polycule member.

In general, our data (Aurel, 2021; Schadler, 2021) show that, among other things, technical tools such as digital calendars are used for organization with several people. This makes it easier to plan one's own as well as joint appointments and to coordinate relationships. For the joint planning of everyday life, many polyamorous relationships hold regular meetings so that the time ahead is structured and all needs are met. Often in polyamorous relationships there are also standing arrangements for common periods of time, so that, for example, something is always done with one partner on Tuesday evenings and with another partner on Friday evenings. Coordinating time together becomes more complex the more people are involved, and challenges arise when, for example, there is little overlapping free time for professional reasons (e.g., night shifts). Other obligations of individual partners, such as supervisory or caregiving duties or logistical distances, make it even more difficult to find common time and make adequate planning particularly necessary. Often, regular check-in rituals are established between partners and metamours (the partners of the partners) to question whether all participants are doing well and whether all needs are being sufficiently met. In order for this to be possible, in polyamorous everyday life, attention is paid to appreciative, understanding and friendly interaction with each other, so that no one feels excluded and dissatisfaction is communicated immediately (Aurel, 2021; Schadler, 2021).

With regard to polyamorous everyday life, our data (Aurel, 2022) also show that when time is spent together, the focus is only on the partner with whom time is currently being spent. This means, for example, that there is no chatting or phoning with other partners who are not present. Time spent together between partners is only interrupted for other partners in an emergency. In such a case, mutual understanding is shown, and there is no insistence that the mutually agreed time is kept. Basically, organizational effort becomes greater with children. Children always take priority over partners and romantic relationships because parenthood is a permanent obligation. For this reason, the partnership level is separated from the parenthood level as far as possible, so that children, for example, cannot become the victims of relationship problems. In this sense, natural hierarchies emerge in the everyday life of polyamory parents, because the needs of children take precedence over the needs of partners.

In a (non-representative) comparison survey, people in non-monogamous relationships reported higher relationship satisfaction than people in monogamous relationships (Conley et al., 2017). This is perhaps an outcome of the communication etiquette in polyamorous relationships. In polyamorous everyday life, an attempt is made to organize togetherness based on the well-being of all participants, and this requires a great deal of communication. Challenges for people in polyamorous relationships are maintaining communication and finding time for every relationship member (Schadler and Villa, 2016). And, of course, CNM relationships are not immune to problems that affect all intimate relationships, such as power asymmetries, gendered divisions of tasks (Raab, 2018) or jealousy (Klesse, 2011).

Even if communication is extensive and the interaction is well organized, unforeseen aggravating circumstances such as the COVID-19 pandemic can occur (Aurel, 2021). Such circumstances then bring completely new challenges for polyamorous everyday life and require a high degree of flexibility so that all participants continue to be satisfied. An example of this is the loss of public space during the COVID-19 pandemic, which meant a loss of space for

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many polyamorous people to meet other partners. Often those partners with whom the living space is shared do not want to meet other partners in that shared living space. However, during the pandemic, there were no opportunities to meet the other partners if they could not come to a partner's home. Flexibility and creative solutions thus became necessary: some, when finances allowed, rented another flat for partners to meet. Others bought a caravan and went to campsites with their other partners. Still others have revised their commitment that no other partners are allowed to meet in the shared living space. This has led to situations where partner X, with whom partner Y shares a living space, is watching TV in the neighbouring room while partner Y is intimate with partner Z in the bedroom that Y shares with partner X. The solutions chosen for such challenges depend on what the participants want and what they are comfortable with. However, this requires that all participants know what they feel comfortable with and also communicate their feelings with their partners. In polyamorous everyday life, as in other relationships, difficult situations and disagreements can arise.

10.3 BECOMING POLYAMORY

Research and our own data show several pathways to engage in a polyamorous relationship. Some individuals just happened to stumble into a polyamorous relationship at a very young age and never went back to another form of relationship after that, while others came to polyamory later in life when the need to open up a two-people-relationship arose for various reasons (Schadler and Villa, 2016). While some base non-monogamy in genetic predispositions or "nature" (Barash and Lipton, 2002), the literature sees relationship styles mostly as something cultural that depends on very specific contexts (Barker and Langdridge, 2010a). Aguilar (2013) showed that preference for a specific relationship type can change when entering a new community. Aguilar interviewed people entering a community where most of the people live a non-monogamous lifestyle. While in the beginning many participants, coming from a culture favouring monogamy, were reluctant to enter into this form of relationship, after two years most of them also engaged in polyamorous relationships and favoured non-monogamous relationships. Access to partners willing to live in a polyamorous relationship and acceptance of the environment of such relationships also seems to play a role (Aguilar, 2013). Others come to polyamory for political reasons: out of their critique on capitalist, heteronormative and mononormative societies they try to find new forms of relationships and caring for one another (Raab, 2018).

10.4 WHO DOES POLYAMORY?

After giving an overview of what polyamory is about, the following section will turn to the questions of who lives in a polyamorous relationship and how many people in the population are affected. It is crucial for this form of relationship that there is no reliable quantitative data on how many people live in polyamorous families because the major censuses and family surveys do not include this form of relationship. Therefore, scholars have to rely on less robust data to estimate the number of CNM relationships. Conley et al. (2012) claim that their (unpublished) survey showed that 4 per cent of Americans live in a CNM relationship. The most sophisticated study to date comes from Rubel and Burleigh (2020), who sampled

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972 Americans and computed an estimation for the population of the US, estimating a range from 0.6 to 5 per cent of Americans live in a CNM relationship and about 2 to 23 per cent of adults do so at some point in their life. For the National Survey of Family Growth 18 per cent of women and 23 per cent of men between the age of 15 and 44 reported a non-monogamous encounter (Aral and Leichliter, 2010). However, there is no record of the nature of these relationships (whether consensually or non-consensually, short- or long-term). There is even less data from Europe. Rothmüller's (2021) study on sexuality during the COVID-19 pandemic investigated sexual relationships during the pandemic and her (non-representative) sample ($n = 4709$) includes 6 per cent in various CNM relationships. Despite the non-representative quality of the available surveys, from this data, the literature on the history of CNM relationships and the debate on definitions, we can safely establish that there is a solid number of people engaging in polyamorous relationships and the visibility of this form of relationship is growing. Moors (2017) investigated Google searches from 2006 to 2015 in order to establish a significantly growing interest in the keyword "polyamory" ($r = .52$, $p > .001$), while other keywords, such as "swinger" declined in interest ($r = .73$, $p > .001$), establishing a growing visibility of and knowledge about polyamory.

Another question might be: who are the people that are engaging in non-monogamous relationships? The data is scarce on this question as well. For one, the growing literature on polyamory mostly consists of qualitative studies. Sheff (2020) defines people who engage in polyamory as non-religious and non-married. Sheff and Hammers (2011) define polyamorous people as white, college educated, and middle class. However, many of the researchers on polyamory are white middle-class people themselves, which might result in access to this certain group (Rubin et al., 2014) and a lack in intersectional data (Haritaworn et al., 2006). In a comparison with monogamous people, Rubin et al. (2014) did not find a higher prevalence of non-monogamy among white people. Their suggestion is, henceforth, that there is indeed a (self-)selection bias in the qualitative data on polyamory. Haupert et al. (2017) find that people of all genders, sexual orientation, religions, regions, political affiliation, and education live in non-monogamous relationships, and therefore there is no specific type of people that have polyamorous relationships. It is a general issue in qualitative research, that middle-class people are more likely to participate in interview studies (Cannon et al., 1988; Cuádraz and Uttal, 1999), which is the most used method in polyamory research. Therefore, the reader has to take this in consideration when reading about the characteristics of polyamory in the following sections. Therefore, our conclusion is, although the data is not very robust, that polyamory is not a relationship-style of specific groups of society, but that it has a solid prevalence among adults and the increased visibility and acceptance of this form of relationship will have people coming out as living in polyamorous relationships that are now living this way in secret.

10.5 PREJUDICE AND STIGMATIZATION

Polyamorous lifestyles are discriminated against due to prejudices and are socially devalued compared to monogamy (Conley et al., 2013). Non-monogamy is often associated with superficiality, inability to pursue meaningful and deep relationships, and irresponsibility (Mayer, 2011). One reason for social rejection of polyamory can be seen in its potential to highlight weaknesses of the heterosexual nuclear family (Sheff, 2020). There is also a lot of superstition and stigma around non-monogamy related to heteronormative and binary concepts of gender

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(Barker and Langdridge, 2010b). There is the concept that men like to engage more in polyamorous lifestyles than women because promiscuous sex is a concept related to certain traditional concepts of masculinity (Gardiner, 2002). Research, however, cannot find any evidence for this myth and also criticizes this picture of sexual desire as a so-called mononormative myth, related to heterosexual norms of love (Mayer, 2014; Pieper and Bauer, 2014). Another preconception, which cannot be reproduced in the data, is that non-monogamy is an issue of relationships between gay men (Haupert et al., 2017). Another study on queer people (n = 111) found that there is no difference in gender concerning the desire for non-monogamous relationships (Moors et al., 2014). There are also no gender-specific differences in the ways people come to polyamory (Ossmann, 2020). Nevertheless, some polyamorous relationships are of course structured around traditional gender roles, which is evident in deeply gendered aspects such as jealousy and division of labour (Klesse, 2017). Overall, polyamory also has the potential to allow freedom for non-normative genders and gender fluidity (Richards, 2010).

The literature, as well as our own data (Aurel, 2021; Schadler, 2021), suggests that many polyamory relationships are lived secretly or partially secretly (e.g., kept secret at work), in particular if the involved people live in families that may look like the norm for outsiders, for example, heterosexual couples keeping their other relationships a secret. Especially in polyamorous networks with children, parents and children often suffer from stigmatization and experience pressure to keep their living arrangements a secret (Pallotta-Chiarolli, 2010). Often, disclosure of the polyamorous lifestyle is accompanied by loss of child custody rights and alienation from families and friends (Klesse, 2019; Ossmann, 2020). In our data from Germany and Austria, we found this secrecy occurred less often if people do not fit binary gender norms or heteronormative family concepts because they feel as if they are already transgressing norms, and transgressing further norms visibly seems easier for them (Schadler, 2021). The growing new authoritarianism in some countries in Europe and the US, which results in a backlash for LGBTQIA+ and women's rights, is also heightening discrimination regarding this form of relationship and is also contributing to many people not coming out as being in polyamorous relationships out of fear of stigma and discrimination and, in the long run, their existence. Nevertheless, our data show that although polyamorous people are activists for their way of life, they do not want to abolish monogamy but criticize its cultural dominance (Santos, 2019).

10.6 OUTLOOK

By promoting multiple partnerships, polyamory allows the questioning of monogamy as the only legitimate form of relationship (Klesse, 2006). In this context, the commitment to communication and honesty in polyamory is seen as having the potential to challenge the hegemonic system of monogamy (Mint, 2004). Another potential of polyamory is the emergence of new subcultural norms (Mayer, 2011). Nevertheless, setting new standards for relationship practice is a critical aspect of polyamory (Klesse, 2006).

With regard to research on polyamory, it is problematic that at times it has largely studied cisgender, white, middle-class individuals with strong internet skills and higher education (Pallotta-Chiarolli et al., 2020). This has neglected an intersectional perspective, so that future studies on polyamory should survey the context more intensively and take intersectionality into account (cf. Pallotta-Chiarolli et al., 2020). In general, it is a challenge to reach people

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who keep their polyamorous lifestyle secret for fear of discrimination. So far, people who are not openly polyamorous are rarely integrated into samples (Pallotta-Chiarolli et al., 2020). Therefore, creative approaches are needed to also survey people with other characteristics (for example, lower educational level and lower income). Previous studies on polyamory have focused on interview surveys (Barker and Langdridge, 2010b). Since polyamory – as this chapter shows – is diverse, interviews as the only survey method cannot be sufficient to survey all the diversity. As a consequence of the one-sided use of survey methods, there is a lack of meaningful quantitative data on polyamory. Due to this lack of quantitative research, it is not known how many people in the population are living in polyamory. However, in order to establish adequate frequency data on the proportion of polyamory in the population, a suitable definition of polyamorous lifestyles is first needed (Rubel and Burleigh, 2020). A uniform definition of polyamorous lifestyles would also be necessary for legal recognition, but it is questionable whether a uniform definition can be generated at all in view of the great empirical diversity. As an outlook for future research, it should be noted that the perspective of other partners, partners of partners, and children, as well as relatives and friends, has not been sufficiently investigated so far. This makes it clear that more research on polyamory is needed (Klesse, 2019; Mayer, 2020). With more research on polyamory, knowledge can be generated that educates people about polyamory. And education can help to reduce discrimination against polyamorous lifestyles and promote social acceptance.

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11. Being single in the twenty-first century

Elyakim Kislev

For centuries, families formed around married couples and their children have been the center of most societies (Coontz, 2006; Kislev, 2022a). Considering historical precedent, the shift toward adults choosing to remain unmarried in large numbers is surprising. In fact, since the second half of the twentieth century, more adults have chosen singlehood than ever recorded before. Among American adults, 22 percent were single in 1950, while around 50 percent were single in the 2010s (Bureau, 2021; Klinenberg, 2012). In addition, the proportion of American children that live with two married parents has declined from 87 percent at the start of the 1960s to roughly 65 percent in the 2010s (Wang and Parker, 2014).

Trends are similar in Europe. For instance, in major cities like Munich, Frankfurt, and Paris, over 50 percent of households are made of one person living alone (Euromonitor, 2013). Similarly, wealthier countries in East Asia, including Japan, South Korea, and Taiwan, have the highest proportion of one-person households in Asia, at 32.4 percent, 23.9 percent, and 22 percent, respectively. By contrast, the percentages in 1980 were 19.8 percent, 4.8 percent, and 11.8 percent, respectively (Dommaraju, 2015; Guilmoto and de Loenzien, 2015; Park and Choi, 2015; Podhisita and Xenos, 2015). Chinese demographics have shifted even more significantly. The percentage of one-person households rose from just 4.9 percent in 1990 to 14.5 percent in 2010 (National Bureau of Statistics of China, 2013).

Across the globe, young adults are waiting longer to get married (Adamczyk and Segrin, 2015; Adamczyk and Trepanowski, 2023). Increasingly, young adults are also deciding to completely avoid intimate partnerships and choose singlehood even though single status is often viewed negatively (Girme et al., 2023; Kislev, 2019b; Moore and Radtke, 2015). Recent studies show that many singles eschew romantic relationships even when they have an opportunity (Kislev, 2019b; 2021; Lehmann et al., 2015). The following delves into the various definitions of the growing population of voluntary and involuntary singles.

11.1 DEFINING SINGLEHOOD

While most understand singlehood intuitively, it is hard to define the term clearly (Bergström and Brée, 2023; Mortelmans et al., 2023). One reason is that new types and patterns of romantic relationships are continuing to emerge. Now, multiple lifestyle options and living arrangements make it harder to define singlehood, demonstrating that singles are not a homogeneous group (Lehmann et al., 2015; Pepping et al., 2018). For instance, living with someone does not always imply the presence of a romantic relationship, and living alone does not necessarily indicate that someone does not have a partner (Kislev, 2020a). Various living arrangements are on the rise, both in the context of romantic relationships and singlehood. Chosen singlehood, extramarital cohabitation, and living apart together (LAT) are all growing, but the diversity of singles is often overlooked in academic research and policymaking (Bernard-Allan, 2016; Moore and Radtke, 2015; Reynolds et al., 2007; Terry, 2012). The following exemplifies

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this complexity and shows that singlehood can be best described as a subjective stance and identification.

Looking at singlehood as an internal state, Stein (1978) theorized a basic distinction between involuntary singlehood and voluntary celibacy. He contends that singlehood generally falls within four basic categories: voluntary temporary, voluntary stable, involuntary temporary, and involuntary stable. In a study of 30 women aged 30–60 interviewed between 1998 and 1999, Reynolds et al. (2007) determined that singles may switch between these categories as the primary reason for remaining single. Analyzing participants' discourse, they found that there is not always a clear distinction between chance and choice when defining singlehood. For example, "not meeting a suitable partner" was cited in the study as a reason for both involuntary and voluntary singlehood. Some participants did not care whether their decision to stay single was related to chance or choice. Another reason participants often gave for remaining single is described as "I have not felt the need", and the authors noted that this might point to other issues. On the one hand, this reason for singlehood legitimizes remaining single as a normal aspect of one's social life. On the other hand, single people who gave this reason showed themselves to be outside of normal experience, in that most people desire sexual and emotional relationships, and admitted that people may see them as asexual or "different".

A further complication of understanding the ambivalence of singles is when one looks at external contexts: the fact that they are historically marginalized in societies that heavily depend on marital norms (which will be discussed in the next section) (DePaulo, 2023). The implication is that singles may consider singlehood a choice to help compensate for the loss of social standing that goes along with being single. According to this view, therefore, the narrative of voluntary singleness may be considered an effort to make sense of the stigma that accompanies singlehood in general.

At various stages of life, being single can present distinct outcomes. For younger individuals, it grants them the liberty to venture onto diverse life paths and wholeheartedly pursue their interests, unencumbered by the commitments of a serious relationship, while others face social pressure to marry (Kislev, 2019b; 2022a). Conversely, older singles can relish in the independence and adaptability of their daily routines, free from the obligations associated with long-term partnerships or raising a family, while others face a stigma that is based on the intersection of ageism and singlism (Ermer and Keenoy, 2023; Kislev and Marsh, 2023).

Bernard-Allan (2016) argues that the way single women negotiate the single state is dialectical. Her argument is that women eventually accept singlehood after undergoing several "improvisations" through which they begin to view their single status positively. Likewise, Moore and Radtke (2015) found that middle-aged single females negotiate their identity by switching between three narratives: the singlehood as deficit narrative, the transformative midlife narrative, and the comfortably single at midlife identity. They concluded that these women's lives are sometimes described as "an ongoing struggle to create and maintain a space where being single constitutes normalcy, while at the same time having to answer to normative discourses of womanhood" (Moore and Radtke, 2015). Yet, women who managed to use an alternative of singlehood to release themselves from the limits of traditional, heteronormative expectations of marriage and family only achieved a temporary state of autonomy.

Studying a group of single gay men, Hostetler (2009) questioned the previously unchallenged idea of voluntary singlehood. Findings from his study included the idea that the "celebratory nature" of singlehood, in which it is presented as a choice instead of something imposed by external factors, was a narrative that single men used to understand their single-

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hood and add meaning to their lives retrospectively. Hostetler also found that even if gay men reported making a conscious choice to be single, they were generally dissatisfied with singlehood and hoped to change their status.

Yet again, the reason behind this narrative is frequently linked to the social pressures that singles face, intersecting with the stigma imposed on LGBTQ+ members (Lavender-Stott, 2023). We cannot explain the challenge of feeling single as being found within oneself. Rather, it is a symptom of the stigma and prejudices associated with singlehood, and the social pressures to find a partner (DePaulo, 2011; DePaulo and Morris, 2006; Morris et al., 2008). Indeed, Reynolds et al. (2007) determined that women's struggle to define their single status as a conscious choice was significantly undermined by current cultural norms. Therefore, it is important to delve into the stronghold of these norms around singlehood.

11.2 THE CULTURAL NORMS OF BEING SINGLE

Cultural definitions and the overall perception of singlehood heavily depend on cultural expectations of heteronormativity and, in particular, the default opinion that people wish to uphold the ideals of family life. Even today, the expectation that people will get married, often called matrimania, is considered the social norm, while singlehood remains a deviant category, a phenomenon that some call singlism (DePaulo, 2011; Moore and Radtke, 2015; Morris et al., 2008).

Women are more likely than men to be subjected to the negative stereotypes of singlehood. Single women are often suspected of leading meaningless, empty lives and lacking morals, while other single women face accusations of confronting the patriarchal status quo (Lahad, 2017; Moore and Radtke, 2015). On the other hand, single men face these stereotypes more rarely (Sandfield and Percy, 2003). In addition, we can see that gender biases have influenced how singlehood is studied. Researchers are more likely to study single women than men (Suen, 2015).

The fact that society still views singlehood as a passing state or preparation for entering a relationship shows how strong the expectations of marriage and family are on the definition of singlehood (Sandfield and Percy, 2003). Lahad (2017) gives an important analysis of what society expects for a linear progression of life. The single state, in this sense, is a "non-scheduled status passage", which goes against the "normal" life path. In turn, we must consider that the experience of singlehood will be quite different between younger singles and those in their thirties and beyond (Kislev, 2018; 2020c). Yet, many people of all ages, identifications, ethnicities, and sexual orientations choose to remain single and growingly so. The reasons for this decision are detailed in the following section.

11.3 REASONS FOR SINGLEHOOD

Studies have identified several possible reasons why people stay single (Adamczyk, 2017; Frazier et al., 1996). The first major category includes the choice of singlehood for many different reasons, where the individual is happy to remain single. For example, the individual might not think their life would be better with a romantic partner, having a preference for greater freedom, and seeking new opportunities. All of these factors are linked to single people

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and the choice to stay that way (DePaulo, 2015; 2018; Kislev, 2018; 2021; Klinenberg, 2012). Among the second category, we can include factors that people see as barriers to entering relationships. These can include moving to another country, relocating to the city, or career concerns (Kislev, 2019a). The third category, however, includes reasons for singlehood that might be understood as arising from ideas about being unattractive or not "good enough" to find a partner (Pepping et al., 2018).

Other studies mention more reasons to remain single (Kislev, 2019a; Pepping et al., 2018; Prabhakar, 2011). In particular, researchers are increasingly thinking about attachment style as a way to understand people choosing singlehood or finding themselves single involuntarily (Pepping and MacDonald, 2019; Pepping et al., 2018; Schachner et al., 2008). Avoidant attachment style involves fear of intimacy and an excessive sense of self-reliance. Self-reliance can cause a mindset and accompanying behavior, making it more difficult to establish a romantic relationship. Likewise, an anxious attachment style is associated with a fear of abandonment and often causes the anxious partner to be distressed. In turn, emotional distress causes the anxious partner to incessantly seek reassurance and become hypervigilant for signs they will be rejected by their partner, both of which make it harder to sustain intimate relationships (Pepping and MacDonald, 2019).

Considering the data, Pepping and MacDonald (2019) hypothesize that a large percentage of singles show an insecure attachment style. This includes both anxious and avoidant behaviors. On the other hand, Pepping et al. (2018) found that choosing voluntary singlehood is more common when someone meets their attachment needs outside of romantic relationships.

Consistent with this theory of singlehood as it relates to attachment theory, Apostolou et al. (2019) explained involuntary singlehood in the context of evolutionary theory. They hypothesize that singlehood should be rare from an evolutionary perspective, without outside influences. From this, they proposed that many people are not in a romantic relationship because forming and sustaining relationships generally is difficult for them. Overall, this study found that most of the time being single long-term is undesirable and that many people who choose to remain single do so due to personality flaws that can be identified as resulting from attachment anxiety.

Yet, these theories somewhat ignore rising personal preferences for freedom and flexibility in an age of post-materialism (Lesthaeghe, 2010; Van de Kaa, 2004) at the expense of tying the knot (Kislev, 2018). Indeed, the rise in post-materialist values is manifested in tandem with choosing to remain single. In an age when the Great Depression, the world wars, and the Cold War are becoming increasingly distant memories, and economic development is on the rise, individuals increasingly consider living independently to gain independence and freedom (Kislev, 2019b). In turn, it was shown that holding post-materialist views provides greater levels of happiness for singles than it does for cohabiters and married individuals (Kislev, 2018), raising questions about the relationship between marriage and happiness in a post-materialist era.

Considering the wide variety of reasons why people choose singlehood, it is important to discuss the implications of singlehood in a more nuanced way. Voluntary and involuntary singlehood can relate differently to outcomes such as health and well-being, a differentiation that literature often ignores.

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11.4 SINGLEHOOD AND ITS CONSEQUENCES

Some older studies draw a link between marriage and factors such as good psychological health (Gove et al., 1983; Johnson and Wu, 2002), reduced levels of depression (Wade and Pevalin, 2004), improved health (Dupre and Meadows, 2007; Hughes and Waite, 2009), and increased longevity (Sbarra and Nietert, 2009). Research has also found that expected increases in economic success (Chun and Lee, 2007), levels of happiness (Stack and Eshleman, 1998), sexual satisfaction (Pedersen and Blekesaune, 2003), and many other measures of well-being (Musick and Bumpass, 2012) can be attributed to being partnered.

The causation between marriage and quality of life has been attributed to a variety of mechanisms, including direct emotional, practical, and financial support from the partner, less risky behavior (e.g., unsafe sex), psychological conditions (e.g., loneliness, depression) associated with a single person's lifestyle, and legal and economic efficiencies of being registered as married (Gallagher and Waite, 2000; Gove et al., 1983; Johnson and Wu, 2002).

However, other studies have found that the links are more complicated and that these studies had limitations (DePaulo and Morris, 2005; Dush and Amato, 2005; Kislev, 2019b). For one, because singlehood is not seen as legitimate, discrimination against singles, which is critical in understanding the causes of these disadvantages, was left unnoticed in most studies (DePaulo, 2014; DePaulo and Morris, 2006; Kislev, 2019b). Second, many did not account for whether self-selection could be a factor affecting results. Evidence supporting a selection effect in marriage has been found with a variety of mechanisms (Mastekaasa, 1992; Nakosteen and Zimmer, 1987; Waldron et al., 1996). A longitudinal twin study also found that there is a selection mechanism into marriage (Burt et al., 2010). Overall, studies have shown the selection mechanism to be responsible for half of the apparent benefits of marriage (Kislev, 2019b; 2020c).

Indeed, in a longitudinal study of more than 12 000 Americans who repeatedly reported on their general health, Tumin and Zheng (2018) looked at whether singles became healthier after they married. They looked at marriages of up to four years, those between five and nine years, and over ten years. Marriage has changed over time, so they also looked at different birth cohorts: 1955, 1965, and 1975. Only the oldest women (1955 birth cohort) who stayed married the longest described their health as a bit better after they had married. In a 16-year study of more than 11 000 Swiss adults, Kalmijn (2017) found that the participants became no less ill after they married than they were when they were single. Overall, their health became worse after they married, with a small but significant effect. Then, over the course of their marriages, their overall health continued to decline.

The discrepancy in results can also be attributed to grouping all singles together (Park et al., 2023). Lehmann et al. (2015), for example, suggest that previous research on well-being and marriage typically views married and single individuals as homogeneous groupings and failed to account for individual differences. They hypothesize that differences between the partnered and single groups are oversimplified and that those studies fail to account for other aspects of well-being, such as personality, gender, relationship history and satisfaction, work history, the length of relationships, and someone's social network (see for example: DePaulo, 2015; 2018; Kislev, 2022b). For this reason, the link between romantic relationships and mental health is more complicated than originally thought (Adamczyk and Segrin, 2015).

Indeed, one example of the "groupings problem" is the literature regarding voluntary singlehood that challenges the assumption that relationship status, mental health, and well-being are

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negatively affected by being single. Now that singlehood is growing in popularity and social acceptability, there are growing correlations between singlehood and positive effects such as independence, personal freedom, and autonomy, which are replacing the narrative of failure or personal deficits (Adamczyk and Segrin, 2015; Kislev, 2018).

Lehmann et al. (2015) found that, regardless of someone's relationship status, satisfaction with current status resulted in less distress and higher satisfaction with life. Indeed, singles who are satisfied with their status have a high level of general life satisfaction (Kislev, 2021). Furthermore, people who have little social support often experience higher levels of emotional distress, regardless of their marital status.

Similarly, Adamczyk and Segrin (2015) found that social support outweighed relationship status as a determinant of mental health, although those in nonmarital romantic relationships were more likely to feel supported than single individuals. Despite these findings, the difference in the mental health and well-being of partnered and single individuals was statistically insignificant. They concluded that while being in a romantic relationship did not directly influence well-being and mental health, partnered individuals received more social support than their single counterparts and that the increased sense of social support correlated positively with better health outcomes.

Somewhat in contrast, Musick and Bumpass (2012) showed that moving in with a romantic partner or getting married results in a decrease in social ties – one that persists for at least six years, which was the length of the study. Other studies also question the notion that partnered people get more social support than singles. Amato and colleagues (2007) compared how social behaviors among couples had evolved between 1980 and the year 2000. In the year 2000, couples were less likely to participate in social activities. By contrast, singles have become much better at building social networks over the same time period. Moreover, an analysis of more than 200 000 survey participants from 32 countries (Kislev, 2020c) shows that singles now have increased social capital, which, in turn, has a positive correlation with being happier. In addition, singles derive more happiness from the same number of social connections than married couples. From this, we see that singles can, and often do, leverage social interaction to improve their well-being significantly. Finally, this study found that singles who are more proactive about social participation can surpass couples on a happiness index.

Furthermore, studies that hope to estimate how choosing singlehood affects social satisfaction and the assigned value of friends demonstrate that singles who are less relationship-oriented are more socially satisfied and assign a higher value to friendships (Girme et al., 2023; Kislev, 2020b; 2020c). In other words, it was found that if singles want a relationship but do not have one, they are less socially satisfied and assign lower importance to friends. Conversely, choosing to be single has a positive correlation with increased satisfaction in both areas (DePaulo, 2023). Both results are consistent with previous studies that suggest an increase in networked individualism and larger social networks among single people (Kislev, 2019b; Wellman, 2012).

In another study (Kislev 2021), I found that people who choose singlehood are more sexually satisfied, not because they have more casual sex, but because they desire less sex. For women, desiring singlehood is also associated with being less sexually active than those who desire a partner.

It appears that singles with low relationship desire are those who particularly derive emotional, social, material, and financial support from friendships and make them central to their lives. Overall, this suggests that this group of singles draws more heavily on their friends for

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roles traditionally held by the nuclear family (Bellotti, 2008; Fileborn et al., 2015). Indeed, as opposed to the defensive denial of the need for intimacy, which has a detrimental effect on relationships in general, voluntary singlehood is associated with satisfaction with being single, self-fulfillment, and personal autonomy (Kislev, 2021). Involuntary singlehood, on the other hand, is associated with regret and dissatisfaction with single status (Timonen and Doyle, 2014).

It follows from these findings that satisfaction with single status (voluntary singlehood) will be associated with better outcomes than dissatisfaction with single status (involuntary singlehood). Indeed, regardless of whether perceptions of voluntary and involuntary singlehood are objectively true, Reynolds et al. (2007) showed that the perceptions of singlehood as voluntary or involuntary are associated with different outcomes. Slonim and Schütz (2015) reported that those who viewed themselves as single by choice expected fewer benefits from romantic relationships and were more likely to view relationships as potentially constraining and causing boredom or stress. In their sample, those who viewed their singlehood as caused by circumstance had similar expectations to their partnered counterparts of the cost and benefit of romantic relationships. It follows that those who viewed singlehood as the result of personal choice did not experience the same sense of failure and lack of agency as those who viewed singlehood as involuntary. In turn, different perceptions of singlehood can correlate to societal views on self-determination and autonomy, both of which influence psychological and physical well-being (Adamczyk, 2017; Reynolds et al., 2007). Likewise, Adamczyk (2017) discovered that people choosing singlehood might correlate with a higher level of mental health and fewer mental health problems, along with less romantic loneliness. Different perceptions of singlehood may, in turn, reflect more general views on autonomy and self-determination – aspects that contribute to physical and psychological well-being (Adamczyk, 2017; Reynolds et al., 2007).

11.5 CONCLUSION

There are indicators that the social forces leading to increased singlehood will continue to accelerate (Kislev, 2019b; Klinenberg, 2012). Not only is there a larger proportion of single people than a few decades ago, but societal norms are also changing in ways that better include singles. Considering how many young adults delay marriage and the burgeoning divorce rates (around 40–50 percent in Europe: Eurostat 2017), it is critical to think about research design, an educational system, and public policy that are compatible with the needs of twenty-first-century singles. We should ask questions such as: how do we prepare future generations for longer periods of being single? How do we cater to the need for social networks and support systems for singles in older ages? In addition, we should distinguish between types of singles in research, singles by choice and singles by circumstances, in particular. For policymakers and researchers, this differentiation is a must since it helps explain variations within the singles population.

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PART III

PARTNERSHIPS ACROSS THE LIFE COURSE

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12. Dating and online partnership formation

Gina Potarca

The emergence of digital partner selection through either online channels specifically meant for partner search (e.g., dating websites, swipe-based smartphone applications) or those in which romantic or sexual selection occurs without it being its primary function (e.g., social networking sites) was preceded by several factors. First, larger cultural shifts, such as rising networked individualism (Castells, 2009; Requena and Ayuso, 2019) and the multiplication of romantic options and pathways into union formation (Feldhaus and Preetz, 2021; Manning, 2020), paved the way for partner selection to become more complex and privatized (Bergström, 2022). Second, technological progress made online-mediated communication ubiquitous and nudged the transition from in-person meeting spaces to the digital realm. In addition to enlarging the dating pool, the latter allowed for increased agency and a diversification of partnering needs. In one of the first studies highlighting the rise of internet dating in the US, Rosenfeld and Thomas (2012) reported the evolution of different meeting contexts since the 1950s. They highlighted a noticeable shift in recent decades, moving from the traditional practice of selecting partners through the family and community to more privatized meeting contexts involving interactions with strangers, especially online.

Internet dating, especially the introduction of dating websites early on, proposed a new way of contacting and selecting partners (Finkel et al., 2012). Registered users first provided extensive information on their profile, preferences, interests, lifestyle and personality traits. After this stage, users were then able to browse through multiple proposed matches, often with the aid of imposed selection constraints. Through their distinctive features (e.g., reduced interference of family or friends, enlarged structure of opportunity, anonymity), as well as the benefits that swipe-based dating apps later provided (e.g., increased mobility, simplified game-like interface, unlimited access given the ubiquity of smartphones), digital spaces became alternative partner markets with the potential not only to substitute declining traditional matchmaking structures, but also to transform the way people partner. If we take a structural perspective on partner choice (Blau et al., 1984), then these alterations to the ecology and structure of the marriage market should lead to different ways of selecting partners and ultimately different marital choices. This chapter outlines several strands of research inspired by the advent of online dating and which attempted to precisely understand its impact on the way people select partners and relationships at large.

12.1 ONLINE DATING TRACES: STUDIES OF PREFERENCES AND CONTACTING BEHAVIOUR

In addition to transforming the way dating and courtship unfolds, dating websites also heralded new ways of studying partner selection. Social scientists saw the potential for innovative data on mating behaviour when people created their dating profile and contacted and responded to potential partners. Gaining access to these data allowed researchers to open the proverbial

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"black box" of early-stage courtship and observe what was previously difficult to study on a large scale, or even at all. The main theoretical view on individuals' partner choices is that they are driven by three main aspects: (1) preferences for certain types of partners and certain traits (i.e., the so-called demand side of partner selection); (2) the structure of opportunity (i.e., the supply of potential partners, opportunities to interact); and (3) the interference of third parties such as family and friends (Kalmijn, 1998). Preferences had been either inferred from final marital outcomes or directly measured via survey data, but often subject to social desirability bias (Yancey, 2007). Using digital data allowed scholars to observe and assess a more genuine expression of preferences (Geser, 2007), less constrained by structural limitations in the local marriage market (as people had easy access to other spaces), less disturbed by the influence of third parties, and less affected by interviewer bias.

As a result of these new data opportunities, research in both the US and Europe started to explore partner selection using data derived from online dating preferences (e.g., Bergström, 2018; Feliciano et al., 2009; Potarca et al., 2017; Potârcă et al., 2015; Potârcă and Mills, 2015; Robnett and Feliciano, 2011) or first-stage interaction records (e.g., Curington et al., 2015; Hitsch et al., 2010; Kreager et al., 2014; Lewis, 2013; Skopek et al., 2011b). What these studies first revealed was the demographic profile of the online dating population, which often overrepresented men (Skopek et al., 2011a), the better educated, those with previous union experience (Feliciano et al., 2011) and urban dwellers (Sautter et al., 2010). For sociology in particular, the increasing centrality of the internet in the creation of social ties provided opportunities to revisit old inequalities in new social spaces and investigate whether deep-rooted social cleavages had been reproduced, reshaped, or reversed in the digital world (Kashyap, 2021). Contrary to initial utopian predictions that the internet would level the playing field and break down barriers of race and economic status (Barlow, 1996), these studies revealed partnering preferences and choices that mirror known assortative mating and hierarchical patterns. This included strong tendencies to match with someone from the same background or to favour higher ranking socio-demographic groups over others. A study looking at contacts and replies on a German online dating platform, for instance, found evidence of educational homophily (i.e., preference for candidates with similar education), but also gender disparity in openness towards lower educated partners (Skopek et al., 2011b). Men were more willing than women to "contact down" on education, in line with traditional norms in which the male partner holds a superior social status. Similarly, other studies found that internet daters preferred partners who are similar in age, although there was also evidence of age hypergamy, that is, men preferring younger women (Bergström, 2018; Phua et al., 2018; Skopek et al., 2011a). Furthermore, research looking at racial preferences in either the US (Feliciano et al., 2011; Lundquist and Lin, 2015; Robnett and Feliciano, 2011) or Europe (Potârcă and Mills, 2015) revealed unequivocal hierarchies that placed whites or natives on top as the most preferred, followed by a racial middle inhabited by Asians and Hispanics, and at the bottom, either Blacks (in the US), or Africans and Arabs (in Europe) as the least preferred. We also saw that the extent of this racial bias varied across national contexts and that it often intersected with hierarchies of education and gender (Curington et al., 2021; Feliciano et al., 2009; Lin and Lundquist, 2013).

Several studies also identified hierarchies of desirability and attractiveness – based on the number of messages a user receives – and a tendency to gravitate towards the most desirable potential partners, irrespective of one's own standing (Bruch and Newman, 2018; Kreager et al., 2014). In non-Western contexts, such as Japan, research additionally showcased the impor-

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tance of family characteristics in online daters' preferences, with potential partners originating from large families – a marker of would-be obligations towards in-laws – being less preferred than those from smaller-size kin networks (Yu and Hertog, 2018). Despite this seemingly pessimistic picture of rigid social hierarchies persevering online, research looking at the dynamic nature of preferences (i.e., examining exchanges over an extended period of time) saw that preferences are subject to change and become more open as users continued interacting in the virtual space (Lewis, 2013).

Despite valuable insights gained from analysing online dating preferences and interactions, to understand the actual impact of digital partner selection on final matches and long-term outcomes, direct comparisons between couples formed online and offline were necessary. Since digital trace data prevented such comparisons, researchers reverted to traditional methodologies such as surveys.

12.2 LONG-TERM PARTNERING OUTCOMES AND FINAL MATCHES

In recent years, scholars have increased efforts to examine the long-term outcomes of finding a partner via the internet. Research using survey data on where couples met confirmed the importance of meeting online for marriage formation, social sorting and marriage inequality. For heterosexual couples, meeting online compared to offline has been linked to faster transitions to marriage in the US (Rosenfeld, 2017), and more couple diversity (in terms of education, race/ ethnicity, religion) in the US and Germany (Potarca, 2017; Thomas, 2019). A recent study in Switzerland revealed that partnerships formed through mobile dating apps were more mixed in terms of education and geographic location than those formed in either non-digital or other online settings (Potarca, 2020). The same study found that compared to traditional ways of meeting, dating apps displayed a weak association with the traditional arrangement of highly educated men choosing a lower educated female partner (i.e., female hypergamy), but a strong association with highly educated women choosing lower educated men (i.e., female hypogamy). Contrary to earlier results indicating the reluctance of female online daters to partner down (Skopek et al., 2011b), this finding suggested that for university-educated women facing shortages of partner options offline, dating apps were a viable solution to finding a partner, often lower qualified. Explanations for the less restrictive nature of choices made online may include the changing preferences of highly educated women, who now place greater weight on men's non-economic traits (e.g., willingness to share domestic work), but also the specific way people match online. Less concerned by partners' social status in the pursuit of connections that often start out as casual encounters, and in a space where selection is largely based on visual appearance, users are less likely to be homogamously matched. A more recent study (Potarca and Hook, 2023) also shows that meeting online is linked to more egalitarian housework practices for married women with lower education, who are the least likely to achieve such practices when meeting their partner offline. This likely occurs due to increased options, the possibility to engage in more assertive conversations with men, and a greater bargaining power held by women online than in offline partner markets. Since men typically outnumber women on dating platforms (e.g., Skopek et al., 2011a), the over-supply of options grants women an important structural mating advantage. In summary, this cluster of research suggests that, in contrast to earlier findings based on initial preferences and contact-

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ing behaviour, digital partner markets facilitate increased openness and greater social mixing compared to alternative meeting and mating contexts. They also appear to challenge traditional expressions of gender within marriage.

Research has also paid attention to how digital partnership markets have contributed to the disruption of social inequalities in marital union formation. Recent work has revealed that online dating fosters an uneven distribution of opportunities for marriage, improving the marital prospects of highly educated women (but not those of lower educated ones) in Germany (Potarca, 2021). The online dating advantage of the highly educated was partly explained by better matching on marriage orientation and gender values, indicating once again that especially for this group, which normally faces marriage market shortages, the internet provides a more efficient way of selecting partners and is more conducive to marriage. The shift from a commonly observed negative educational gap in marriage among couples formed offline to a positive educational gap among those formed online highlights the potential that digital partner selection has in reversing long-standing inequalities in union formation.

Scholarship has also addressed the association between meeting online and relationship quality. Some research has indicated that partnerships formed online were linked to more positive relationship outcomes, including greater marital satisfaction and lower risk of break-up (Cacioppo et al., 2013). Other studies, however, found no significant link between meeting online (in general, or through dating apps in particular) and partnership satisfaction (Potarca, 2020; Rosenfeld and Thomas, 2012). Very few of these studies, however, were able to account for unobserved selection into online dating.

It should also be noted that given sample size limitations, quantitative research has often collapsed different online modalities of selecting a partner into a single category. Given the remarkable rise of dating apps in the last decade, their greater popularity among the young (compared to websites), and mounting speculation regarding the culture of disposability and the normalization of hook-ups that they promote (Sales, 2015), recent research has tried to single out the impact of these specific digital tools of mate selection. Leaving aside the bulk of studies based on convenience samples or qualitative research exploring users' experience with the surplus of choice on these platforms (Hobbs et al., 2016), investigations relying on nationally representative data showed that the use of dating apps does not necessarily lead to more partnering (Rosenfeld, 2018) and that, contrary to expectations, app users have stronger family formation intentions than non-users (Potarca, 2020). Though more research is required to assess long-term impact on relationships, these studies generally disconfirm alarmist claims regarding the large-scale negative effects of dating apps on long-term commitment.

12.3 THE WELL-BEING AND MENTAL HEALTH OF DATING WEBSITE AND APP USERS

Penalties and pitfalls of engaging in digital dating, however, do exist. Critics of online-mediated interactions have pointed out that anonymity, especially the absence of social scrutiny, carries the risk of experiencing harassment and aggressive acts, particularly among women (Cooper and Sportolari, 1997; Herring and Stoerger, 2014). Early on, optimists had claimed that disembodied interactions on dating websites would afford users the possibility to select partners on grounds other than physical appearance, especially given the interference of matching algorithms based on personality and interests (Cooper and Sportolari, 1997). Others, however,

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challenged these assertions by indicating that online interactions were not at all disembodied; on the contrary, physical appearance is a dominant component of self-presentation online, making daters hyperaware of their and others' body image (Lopes and Vogel, 2017; Thompson, 2018). This tendency is allegedly amplified among dating app users, who rely on pictures as the main instrument of self-description and selection of mates. In addition to potentially increasing body image (self-)surveillance, apps have also been criticized for inducing a so-called Tinder fatigue effect (Beck, 2016) in reference to the time-consuming and exhausting nature of using the popular dating app. The game-like interface of swipe-based apps prompts users to jump quickly from one partner option to another, and in so doing consent to a dating culture of objectification, disposability (Lopes and Vogel, 2017; Newett et al., 2018), score-keeping mentality (Gill and Orgad, 2018; Ward, 2017), and regular rejection of others (Pronk and Denissen, 2019). The cumulation of these negative aspects has raised concerns regarding potential detriments to the well-being and mental health of users (DiRisio, 2019; Whitley, 2018).

What research has found, for instance, is that dating apps' use was associated with unhealthy weight control behaviours among US adults (Tran et al., 2019), or that heterosexual men – but not women – using Tinder had significantly lower levels of self-esteem compared to non-users (Strubel and Petrie, 2017). Another study using German data found that searching for partners through mobile dating was linked to greater stress among men, whereas use of dating websites predicted women's depressive symptoms, an effect which was largely explained by lower levels of self-esteem (Potarca and Sauter, 2022). A great deal of work has also been devoted to assessing the association between digital dating practices and health-related vulnerabilities among sexual minorities, particularly among men who have sex with men (for a review, see Obarska et al., 2020). Use of smartphone dating applications was linked to substance use (Choi et al., 2017; Zervoulis et al., 2019), experiences of objectification (Anderson et al., 2018; Filice et al., 2019; Goldberg, 2018), or sexual risk behaviour (Choi et al., 2016; Hahn et al., 2018; Knox et al., 2021). Despite wide interest in the topic, research based on nationally representative data or using a longitudinal design (for an exception see Wang et al., 2020) that would allow for better ways of accounting for selection bias is largely missing. The results found so far may thus be considerably affected by selection processes, as young adults with already low levels of self-esteem, poor mental health and a preoccupation for appearance may self-select into digital partner markets as these spaces would afford them increased control over how best to curate their physical representation (Rodgers et al., 2019).

12.4 AVENUES FOR FUTURE RESEARCH

So far, we have looked at the impact of digital dating markets on how partners are selected in the early stages of courtship, the types of relationships that result in these less restrictive spaces, and associations with poor mental health, but much is left unexplored. As online matching becomes increasingly and uniformly prominent – in the US for instance, it is the number one way of meeting a partner (Rosenfeld et al., 2019), in Switzerland, it is the second (Potarca, 2020) – research should aim to understand other ways in which digital dating impacts individual well-being, couple longevity, relationship quality, and population-level patterns of cohabitation, fertility, or re-partnering. Giving credence to the idea that virtual spaces facilitate the creation of non-normative relationships by offering multiple possibilities of connecting

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and communing with like-minded individuals willing to experiment with new relational roles (Requena and Ayuso, 2019), it would be worthwhile, for instance, to study whether digital mate selection leads to an increased prevalence of partnership configurations such as long-term, non-residential unions or non-dyadic arrangements such as polyamory.

Moreover, we are yet to fully grasp the intricacies of how technology impacts relationships, especially across different social groups. Some research has revealed educational differences in online effects on the propensity to marry (Potarca, 2021), but growing inequalities in family formation processes (Bloome and Ang, 2020; Mooyaart et al., 2021), variation in digital skills, and differences in the ability to draw concrete benefits from internet use (Helsper and van Deursen, 2015) are likely to create an unequal distribution of benefits for partnerships. The scope of research could also be expanded by focusing on multiple countries. Nationally representative studies on the impact of digital technologies on partnering have so far been performed on a handful of countries only (e.g., US, Germany, Switzerland). Nevertheless, national context, with its set of norms, institutions and structures of inequality, is likely to moderate the impact of technology on modern relationships significantly (Bacigalupe et al., 2014; Requena and Ayuso, 2019). An important next step, then, is to understand the micro- and macro-level social and economic drivers of the patterns documented here.

Future research should also consider the impact of the COVID-19 pandemic and related measures of home confinement and social distancing on how people experience internet matching. Especially in the early stages of the pandemic, online dating may have become the only context where people could meet others under conditions of social distancing. Some studies have already confirmed a post-pandemic surge in the use of phone dating apps (Ting and McLachlan, 2022), but longer-term effects on partnering, assortative mating or mental health, which may have persisted after the initial (more disruptive) phases of the health crisis subsided, are yet to be documented. Some voices in the media suggested that app developers introducing video chat options early in the pandemic (Crow et al., 2020; Faludi and Crosby, 2021) afforded additional time to pre-screen potential partners, leading to deeper intimacy and a more intentional sharing of values before meeting in person (Vinopal, 2020). Others also hypothesized that dating during the pandemic led to changes in preferred traits in a partner (e.g., an emphasis on kindness rather than social status) and more openness towards partners from other sociodemographic groups (Konrath, 2020). Furthermore, technological innovations in dating such as the incorporation of virtual reality and sensory interactions, will likely enhance the experience of dating online, with potential consequences on how people select partners but also on how they sustain intimacy online in the long term. In the future, digital dating studies may thus more frequently observe relationships that not only start but also stay online.

In terms of methodology, research looking at online dating could improve on statistical power and causal inference claims. A great deal of studies, including some cited in this review, are based on small convenience samples, student populations, and cross-sectional data. As online-formed couples become more widespread and as more nationally representative surveys start to incorporate items on digital partner selection, newly generated data, with improved sample size and varied geographical coverage, will allow scholars to revisit some of the questions tested in previous studies. On a related note, increase in sample size would also allow for distinctions between different ways of dating online and a more precise monitoring of which social groups select into different digital dating spaces.

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Furthermore, use of longitudinal data and matching techniques that can help achieve covariate balance between treated (i.e., online-formed couples) and control groups (i.e., offline-formed couples) could mitigate concerns of selection bias affecting results. The pace of collecting data on the topic could also be faster. Despite well-known difficulties in trying to keep up with the fast pace of technological innovations and trends (Kwok and Wescott, 2020), research should nonetheless attempt to capture the impact of new digital ways of partner selection as it unfolds. Since the default methodological choice of most quantitative studies is to contrast digital with non-digital modes of partner selection (and thus treat them as mutually exclusive), another aspect to explore in the future is mixed (offline–online) modes of partner seeking and their interdependencies.

Finally, although some work explores both psychological and social variation in the population of online daters (e.g., Potarca, 2021), interdisciplinary studies on online dating are rare. Most research advances along separate disciplinary lines, for example, within sociology, psychology, communication studies, computational science. Joining efforts to track the online and offline partner search strategies of partner seekers across time, mining their digital interactions while also collecting sociodemographic, biometric and psychological data to comprehensively untangle the various mechanisms at play, could be a potential avenue for future collaborative research.

12.5 CONCLUSIONS

In this chapter, we reviewed extant research on how digital instruments of partner search and selection (websites, swipe-based apps, social networks, etc.) have been shaping processes of relationship formation, assortative mating, marriage inequality, as well as health-related outcomes. We saw a first wave of studies that used Big Data methodologies and data derived from dating websites to uncover patterns of homogamy and hierarchy in users' preferences and interactions. Findings resulting from this research disputed the idea of the internet as emancipatory technology. Apart from perpetuating old hierarchies, internet dating also fostered types of discrimination that are often undetected in offline contexts, such as sexual racism (i.e., gendered preferences for partners from specific racial groups) (Curington et al., 2021). While these results provided valuable insights into the sexual and romantic choices individuals make when (seemingly) no one was watching, research looking at online dating material only addressed the early stages of digital partner selection. In the absence of a comparison group (i.e., individuals seeking partners offline, or couples formed in non-digital ways), these studies were limited in the conclusions they could draw on the actual impact of individuals using online dating.

Subsequent studies have used conventional survey data to examine partnering outcomes by comparing individuals who date online and offline. These studies have made important progress into understanding longer-term consequences and the equalizing or stratifying implications of digitalized partner selection. In contrast to non-digital spaces of mate selection, online partner markets have indeed spurred several transformations in partnerships. On online platforms, there is a higher incidence of couples crossing social boundaries. While social homophilous tendencies endure, their "amount" is significantly diminished online. Online partner markets have also encouraged faster transitions to marriage in the US, challenged gender hierarchies in marriage, and reversed a long-standing disadvantage in marriage propensity for

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highly educated women in Germany. Furthermore, recent research has mitigated some of the concerns regarding the negative impact of phone dating apps on the long-term orientation of unions, but also revealed several mental health vulnerabilities associated with dating app use.

Condensing findings looking at early-stage preferences and final partnering outcomes, we realize that both social and technological determinism are at play, meaning that pre-existing social factors, biases and cultural norms shape online behaviour, but that partner choices and relationships are also significantly altered by the integration of technology use. Although some initially expected a radical removal of social bias in digital social connections (Barlow, 1996), and others envisioned the internet as an extension of pre-existing systems of prejudice (Ebo, 1998), research so far provides a picture of online partner preferences and choices as enduringly biased, yet more emancipated than those seen offline.

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13. Re-partnering across the life course

Katya Ivanova

In the fields of family sociology and social demography, it has become commonplace to note the significant change in people's partnership trajectories over the life course, particularly in countries of the Global North (Raley and Sweeney, 2020; Thomson, 2014). This change is characterized not only by diversification in the types of partnerships formed (such as marriage, non-marital cohabitation, and living-apart-together relationships) and shifts in timing and inter-partner dynamics, but also by an increase in the rate of union dissolution. Importantly, unlike in earlier times when the death of a partner was the primary cause of dissolution, the prevalence of (legal) separation has now increased. This rise in first union dissolutions has prompted a great deal of research into subsequent re-partnering trajectories. To start this chapter, I briefly explain what 're-partnering' is and argue for the importance of understanding re-partnering behaviours. Subsequently, I focus primarily on one particularly vibrant area of research, namely, the exploration of disparities in re-partnering chances of individuals.

13.1 WHAT IS 'RE-PARTNERING'?

We need to acknowledge that simply speaking of 're-partnering' is hiding a lot of complexity. What make reviewing this field of study challenging are the diverse approaches that researchers have taken to defining both the 'departure' as well as the 'destination' states within re-partnering trajectories. This largely stems from the increasing proliferation of partnerships other than marriage. Both the type of first and subsequent partnerships can vary in meaningful ways; for example, people can move between consecutive marriages or non-marital cohabitations but also from a cohabiting partnership (marital or not) to a living-apart-together (LAT) arrangement. Furthermore, whereas a re-partnering union can begin as a LAT relationship, those partnerships may remain steady in that form, evolve to a different type of partnership, or dissolve.

The complexity of re-partnering trajectories is undeniably important to consider in light of normative perceptions about marriage and non-marital cohabitation (Gałęzewska et al., 2017; Hiekel et al., 2014; Perelli-Harris and Bernardi, 2015). It is also crucial to take into account the varying rights and obligations that these unions entail in differing legal systems (Perelli-Harris and Gassen, 2012). Therefore, numerous contributions have examined selection into re-partnering using a competing-risks framework, which often focuses on the likelihood of entering into a marriage versus a non-marital cohabitation (Brown et al., 2019; de Graaf and Kalmijn, 2003). Some studies have also added the possibility of forming a stable LAT partnership after the first separation (Bastin, 2019; de Jong Gierveld and Merz, 2013). However, a detailed theoretical examination of the selection into different types of higher order unions is beyond the scope of this chapter. Going forward, I will discuss re-partnering broadly, with a particular focus on marriage and non-marital cohabitation.

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13.2 WHY STUDY RE-PARTNERING?

In addition to coming to a common understanding of what 're-partnering' entails, it is critical to examine the reasons why the phenomenon is of interest. Here, I highlight three core motivations: the effect of re-partnering on socioeconomic well-being, the impact of re-partnering on the strength of intergenerational ties, and the link between re-partnering and other demographic behaviours (fertility in particular).

Foremost, the literature in this field has been largely grounded in the argument that understanding possible inequalities in re-partnering is essential, since entering a new partnership can counterbalance the negative effects of the dissolution of a first partnership (whether through separation or widowhood). Studies have emphasized the crucial role that a new partner can play for an individual's mental health and well-being, both in terms of overall life satisfaction and as a way to combat loneliness, as well as in specific health outcomes such as cognitive health in later years (Brown et al., 2021; Gloor et al., 2021; Wright et al., 2020).

Other contributions have examined the potential of re-partnering to mitigate the negative financial consequences of union dissolution, which are most severe for mothers (Hogendoorn et al., 2020). While studies on the effect of re-partnering on psychosocial well-being seem to suggest that there are no striking gender differences (Gloor et al., 2021; Lin et al., 2019; Soons et al., 2009; Wright et al., 2020), research on economic outcomes consistently shows that having a new partner is important for women and mothers in particular (Bonnet et al., 2021; Dewilde and Uunk, 2008; Fisher and Zhu, 2019; Jansen et al., 2009; Lin and Brown, 2021). This finding is not surprising, given persistent patterns of unequal division of paid and unpaid labour within couples, which can lead to substantial labour market losses for women post-parenthood. This body of research also connects strongly with studies on how welfare state policies can mitigate the potential negative effects of life-course transitions such as separation or widowhood on individual well-being (Recksiedler and Bernardi, 2019).

In addition to examining the socioeconomic effects of re-partnering, the study of these behaviours is also motivated by an interest in their impact on parent–child relationships. Research in this area has taken two parallel paths, with one line of inquiry – mostly stemming from psychological studies – focusing explicitly on how maternal dating behaviours affect the well-being of children and their relationship with their mother (Xiao et al., 2022). The other line of research centres specifically on gender differences in the impact of re-partnering on intergenerational ties, typically focusing on relations between parents and adult children. This line of research is grounded in the theoretical proposition that the gendered division of childcare has significant consequences for how fathers maintain close relationships with their children. As women are often seen as the primary kinkeepers responsible for maintaining family ties (Di Leonardo, 1987; Hagestad, 1986; Hornstra and Ivanova, 2023; Rosenthal, 1985), fathers' relationships with their children are dependent on the union with the children's mother. Therefore, the core expectation is that while union dissolution ends men's ties with a kinkeeper, subsequent re-partnering can further undermine father–child ties, as the new kinkeeper might be more effective in building and maintaining relationships with her own kin. Indeed, findings in this area consistently demonstrate that re-partnering has a clear negative effect on fathers' relationships with their children from a previous union, whereas this is not the case for mothers (Kalmijn, 2007; Kalmijn et al., 2019; Lin et al., 2022).

Finally, re-partnering has been of interest due to its potential impact on subsequent fertility transitions. Stable partnerships are considered the optimal context for having children

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because they allow for sharing of (non-)financial costs. Therefore, social scientists have been concerned about the impact of increased partnership instability on fertility rates. Some studies suggest that re-partnering during people's reproductive years may result in having more children than if the first union had not dissolved (Beaujouan and Solaz, 2008). One theoretical argument substantiating this expectation is that shared children serve a unique function beyond satisfying the desire to be a parent, as they can signal commitment to the new partnership (Griffith et al., 1985; Ivanova et al., 2014). However, empirical evidence suggests that re-partnering cannot fully offset the negative effect of first union dissolution on completed fertility. Research consistently demonstrates that higher order unions are less stable than first partnerships, largely due to selection into partnership dissolution and re-partnering based on – for example – less traditional attitudes or specific personality characteristics (Poortman and Lyngstad, 2007). Moreover, re-partnering unions are often formed at a later age, which can suppress fertility (Beaujouan and Solaz, 2008; Thomson et al., 2012).

13.3 WHO RE-PARTNERS? CORE THEORETICAL ARGUMENTS AND SOME KEY FINDINGS

Re-partnering is a crucial life course transition for many individuals, and researchers have examined who is more or less likely to form a new partnership after the end of their first. The theoretical basis for this research is grounded in theories that were initially developed to explain the decision-making process for first marriages. These theories draw parallels between the process of finding a partner and finding a job and suggest that individuals evaluate the costs and benefits of each option based on their knowledge of the partnering market and their ability to continue searching (Becker, 1981; Goldscheider and Waite, 1986; Oppenheimer, 1988). Researchers studying re-partnering have paid attention to how the (financial or emotional) need to have a new partner, one's attractiveness to potential partners (proxied by, for example, one's socioeconomic, health, or parenthood status), and the opportunity to meet such potential partners (via social networks or online platforms) affect re-partnering behaviours (de Graaf and Kalmijn, 2003). This theoretical approach has been especially useful in examining how individual characteristics impact re-partnering behaviours. In the following sections, I will highlight some of the key areas of research in this field.

13.3.1 Gender or Parenthood?

One of the most consistent findings regarding re-partnering is the gender gap in forming new unions, with men being more likely to do so than women (Ivanova et al., 2013; Poortman, 2007; Wu and Schimmele, 2005). However, the key question is whether this gender gap persists when we consider the impact of parenthood status on re-partnering likelihood. Across countries, mothers still bear the primary responsibility for childcare after the dissolution of a union, which suggests that parenthood status may play a critical role in explaining the gender gap. Indeed, among non-parents, the gender gap in re-partnering essentially disappears (Di Nallo, 2019; Ivanova et al., 2013). It is important to note that this pattern is more evident among younger populations, as gender dynamics may play out differently at older ages, as discussed later in this chapter.

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Children impact all aspects of the re-partnering process. Financially, parents and mothers in particular face greater negative effects of union dissolution (Hogendoorn et al., 2020), which can increase the need for an additional earner in the household. This increased need would imply a positive effect of parenthood on the odds of re-partnering. Some empirical work has shown that policy reforms that decrease welfare payments speed up re-partnering among single Australian mothers (Fisher and Zhu, 2019), which is consistent with the financial need mechanism. However, the (socioemotional) need to form a new partnership could also be negatively impacted by children, as parents weigh in the potential negative impact of re-partnering on their offspring (de Jong Gierveld and Merz, 2013). Aside from impacting needs, the presence of children must also be considered in terms of how it might affect one's attractiveness to others and one's ability to meet potential partners. Numerous contributions have addressed the unique challenges that stepfamilies face (Cherlin, 1978; Ganong and Coleman, 1994; Raley and Sweeney, 2020), which is why being a parent might make one a less desirable partner. Studies have shown that not having children from a previous partnership is a desirable characteristic on the partnering market (Goldscheider et al., 2009). Finally, the possibility of meeting potential partners can be restricted by children, particularly young children, who impose high time restrictions on their parents (Harvey and Mukhopadhyay, 2007) and may actively oppose their parents' re-partnering (Ganong et al., 2011). Overall, when it comes to women, studies have consistently found that mothers have lower chances of entering a new union than non-mothers (Di Nallo, 2019; Ivanova et al., 2013).

The findings regarding the impact of fatherhood on re-partnering are mixed. Some studies report no difference between fathers and non-fathers (Beaujouan, 2012; Di Nallo, 2019; Ivanova et al., 2013), while others find a positive effect (Pasteels and Mortelmans, 2017; Stewart et al., 2003) or a negative effect of fatherhood on the likelihood to re-partner (de Graaf and Kalmijn, 2003). Several factors could be important in understanding these mixed findings. Caution needs to be exercised when trying to consolidate findings stemming from distinct cohorts due to changing patterns of child residence after parental separation, with shared physical custody becoming more common in some countries. Indeed, when we take custody into account, some studies report that full-time residential parents are less likely to partner than other parents and non-parents, irrespective of the parents' gender (Vanassche et al., 2015). However, other research suggests that the lack of difference between fathers and non-fathers remains even if we focus on custodial parents (Di Nallo, 2019; Ivanova et al., 2013). It is crucial to question the extent to which researchers are able to account for the selection into different coparenting arrangements, which may or may not be commonplace in a given country at a given time. All studies control for a diverse set of individual characteristics, but these are not always consistent across publications, undermining the ability to compare empirical findings. Hence, a more careful consideration of how selection might operate is necessary (Schnor et al., 2017). An additional difficulty with consolidating the findings about fathers' re-partnering trajectories arises because in some countries, normative expectations towards fathers have become stricter in past decades, requiring higher paternal involvement in childrearing (Preisner et al., 2020). This can affect how these men are perceived on the partnering market as higher involvement with children from a previous union can also mean stronger ties to the ex-partner. Given the changing ways in which people 'do' family, studies have not come to a clear consensus on how parenthood impacts re-partnering, particularly with respect to fathers.

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13.3.2 Socioeconomic Characteristics

Another focal area of research within the theme of inequality in re-partnering is how socioeconomic status might influence the likelihood of forming a new partnership (Brown et al., 2019; Pasteels and Mortelmans, 2017; Vespa, 2012). Theoretically, economic resources are clearly related to all mechanisms mentioned earlier, including the financial need to have a second earner in the household, as well as one's attractiveness to potential new partners and ability to meet them, if captured through employment status, for example. As sustaining a household on a single income has become increasingly difficult (Sweeney, 2002), higher earning potential has become a desired partner characteristic among both men and women. Another consideration is that an individual's socioeconomic status, as captured by their employment status, can also have ramifications for the 'opportunities' mechanism, as previous research has demonstrated that work is an important context in which higher-order partnerships are formed (de Graaf and Kalmijn, 2003). However, the findings in this area of research are very mixed for both men's and women's re-partnering chances. For example, Pasteels and Mortelmans (2017) found a positive effect of income for men's and a negative effect for women's re-partnering chances using Belgian data. Similarly, Di Nallo et al. (2023) find a negative association between women's educational attainment and re-partnering probability using US data. Rapp (2018) found a more consistent positive association only for men using German data, a finding echoed in data from the Russian Federation and Estonia (Ivanova and Begall, 2015). Vespa (2012) found a positive effect of wealth for both men and women using US data, whereas Brown and colleagues (2019) found no effect for women but a positive effect of home ownership for men's remarriage odds.

The lack of consistency is likely to be for several reasons, including the use of diverse indicators of economic resources (e.g., years of education, employment status, home ownership, income, wealth), focus on different populations in terms of country of origin and life-stage, and different definitions of re-partnering (e.g., remaining single vs starting to live with a partner vs marriage). What appears to be missing from this field is a more systematic, theoretically informed approach about how different indicators of resources, such as educational level vs income or wealth vs employment status, can impact the distinct re-partnering options of individuals.

13.3.3 Re-Partnering at Older Age: Separation or Widowhood

While acknowledging that the re-partnering process may vary significantly across the life course, research on older populations tends to focus less on parenthood and more on the type of union dissolution experienced by the individual (separation or widowhood), as well as on indicators of health and social isolation (see Dykstra, Chapter 14). However, few studies have explicitly modelled how predictors are related to re-partnering chances *across* different age groups, with Rapp (2018) being an exception.

Research on re-partnering in later life is based on the idea that separation and widowhood can differently affect the need for a new partnership, whether financial or socioemotional. One line of reasoning is grounded in the understanding that separation might leave men in particular more isolated (e.g., from their children; Kalmijn, 2007) and thus potentially more in need of a new partner for social support (Wright et al., 2020). Another perspective proposes that separation may have more negative effects than widowhood because widows and widowers

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have access to institutional protections such as survivor benefits (Brown et al., 2018). This mechanism implies that the separation vs widowhood effect should be more pronounced for women due to the gendered economic consequences of separation. However, gendered effects are not always evident. Some studies have shown that widowers express more interest in forming a new relationship than widows, but this gender gap diminishes with similar levels of support from one's social network (Carr, 2004). Other studies report that for men, the type of previous union does not make a difference, but divorced women are more likely to re-partner than widows (Brown et al., 2018). However, some studies have found no effect of how the previous union ended on either men or women (de Jong Gierveld, 2004), while others have shown that widowed individuals are less likely to re-partner than divorcees, irrespective of gender (Rapp, 2018).

As with the literature on re-partnering at earlier ages, the challenge of drawing a coherent overview of findings stems from meaningful differences in the studied populations and the methodological choices made by researchers when defining re-partnering, especially given how much more prominent LAT relationships become at older ages (de Jong Gierveld, 2015).

13.3.4 Need, Attractiveness, and Opportunities: What Have we Really Tested?

The preceding discussion provides various instances of how the theoretical mechanisms of need, attractiveness, and opportunities are utilized in the literature on re-partnering (e.g., de Graaf and Kalmijn, 2003). However, it is crucial to acknowledge that although these mechanisms are commonly used to deduce hypotheses, they are seldom explicitly tested, primarily because of lack of appropriate prospective data. The ability to test these three mechanisms requires that we have data not only on how distinct aspects of needs and opportunities vary across the life course, but also on the composition of the mating market.

Additionally, these mechanisms can often be in conflict with each other, such as the financial need to re-partner versus attractiveness to potential partners. Moreover, we tend to define these aspects narrowly in empirical studies based on the focus of our work. For instance, while income is employed as a proxy for need to re-partner, a mother may weigh in that need differently, considering how a partnership transition may affect her children (de Jong Gierveld and Merz, 2013). The issue of actual interest in re-partnering is that it is rarely explicitly assessed, particularly in quantitative surveys (exceptions are Carr, 2004; Poortman and Hewitt, 2015). However, qualitative research has demonstrated that how people perceive having a new partner is significant, especially at older ages, when people start balancing personal independence versus possibly having to provide care for a new partner (Davidson, 2001).

It is worth noting that the operation of these mechanisms is highly dependent on the actual partnering market, such as the age and gender composition of available singles. At present, researchers mostly focus on how the characteristics of a person potentially searching for a new partnership influence re-partnering, while also considering with whom people re-partner as an indicator of the options available on the partnering market (Di Nallo, 2019; Vanassche et al., 2015). Nevertheless, more direct efforts to capture the perceived attractiveness of 'secondary singles' can provide valuable information about the barriers and opportunities that shape re-partnering trajectories (Goldscheider et al., 2009). Undoubtedly, information sourced from online dating profiles, including people's declared preferences, provides an exciting opportunity to examine the dating market side of the process (Potarca et al., 2017).

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13.4 WITH WHOM DO PEOPLE RE-PARTNER: NEW PARTNERSHIPS, OLD PATTERNS?

In addition to understanding who re-partners, researchers have examined various aspects of the 'content' of re-partnering, driven by an interest in explaining the higher instability of these partnerships compared to first marriages (Lyngstad and Jalovaara, 2010; Mortelmans, 2021). One line of inquiry has focused on whether the potential higher dissimilarity between partners in re-partnering unions, possibly driven by restrictions on the re-partnering market, might explain why they are more likely to dissolve. These studies are grounded in the understanding that homogamy in partnerships is conducive to higher partnership stability (Kalmijn, 1998). Indeed, some studies suggest that educational homogamy, for example, is weaker in new unions than in first marriages (Theunis et al., 2015).

Another motivation to study people's matches in re-partnering is to understand whether individuals 'learn' from their first partnership and adjust their choices and behaviours in subsequent relationships. Scholars in this area of research follow individuals across their life courses to observe the matches they make. Some studies support the 'optimistic' expectation that people learn from their first marriage. For example, Gelissen (2004) found that men are more likely to make a homogamous match the second time around, whereas Bzostek and colleagues (2012) found that among mothers who re-partner, the majority do so with a partner who is more highly educated than their previous partner. Other findings suggest more of a continuity between the educational levels of ex- and current partners, implying consistency in people's choices across partnerships (Ivanova and Begall, 2015; Theunis et al., 2015). Continuity is also found in intermarriage where previous experience of intermarriage increases the likelihood of entering another exogamous union (Obucina, 2016). Similarly, scholars who have focused on the division of (un)paid labour within unions find stability in these behaviours across partnerships (Beblo and Solaz, 2020; Ophir, 2022). Likewise, patterns of interpersonal violence do not appear to change across unions (Ahmadabadi et al., 2018).

Of course, the theoretical mechanisms that drive consistency across partnerships differ depending on the behaviours examined. We can consider whether people's social networks, formed earlier in life, might facilitate the repetition of certain patterns (possibly because those networks are also the source of partners), or we can discuss the extent to which (gendered) social norms and internalized preferences might play a role in keeping patterns consistent across partnerships.

13.5 LOOKING AHEAD

This chapter has provided a non-exhaustive overview of key research areas in the study of re-partnering behaviours. Moving forward, we can add clarity to these studies in several ways. First, scholars need to be explicit about their methodological choices, such as why they study re-partnering only after legal separation, what type of relationship is considered the 'end state' in a re-partnering trajectory based on theoretical considerations, and what important confounding variables should be considered. It is crucial to be mindful of the possibility that including a wide range of additional individual characteristics in the models can substantially change how the final results are to be understood and compared to other studies.

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Undoubtedly, this line of research will remain vibrant as a result of the changing ways in which people 'do' family and gender. Evolving gender dynamics and norms about femininity and masculinity will have repercussions for partnership formation. As mentioned earlier, a key question is how shifts in the understanding of 'good fatherhood' will impact men's re-partnering behaviours. It is possible that in some contexts, the re-partnering behaviours of mothers and fathers will become (or already are) more similar due to a more equal division of child-caring responsibilities. This line of reasoning implies that whereas we may no longer observe a consistent gender gap in re-partnering, the parenthood gap – where parents are less likely to re-partner than non-parents – would remain. Here, qualitative work can be especially valuable in giving us a better understanding of how individuals reason about their roles as parents and how they see a new partner potentially (not) fitting in their lives as they are at the moment.

Changing gender dynamics can also impact the socio-emotional well-being of individuals in relation to re-partnering. For instance, we know that in older cohorts, partners are a primary source of support for men (Umberson et al., 2010), leading to a higher need for men to re-partner. However, as men become more involved with their children and maintain strong bonds with them even after separation, or as men's social networks become less reliant on the presence of a kinkeeper, we may see less social isolation among separated and non-repartnered men. Here again, (qualitative) data collections which focus more explicitly on the subjective experience of (not) being partnered would be immensely valuable in helping us better understand the choices that individuals make across their partnership careers.

It is important to recognize that we are likely to continue observing changes in individuals' re-partnering behaviours due to the evolving composition of the mating market. In other words, the study of re-partnering is highly contingent on who experiences the dissolution of their first union. Currently, there has not been much attention given to the changing selection process into the dissolution of the first union in the study of re-partnering. However, with facilitated access to national registers containing extensive data on demographic behaviours across decades, we could attempt to understand better how changing dynamics in union dissolution are linked to subsequent re-partnering trajectories across the lifespan. Of course, while such data sources would be invaluable in giving researchers an idea of how the characteristics of those 'available' to re-partner might be evolving, these data do not let us assess the way individuals reason about and experience the (potential) re-partnering. Therefore, a carefully considered combination of diverse sources of data remains paramount if what we are interested in is to properly assess and understand the mechanisms driving the observable patterns.

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14. Partnerships in later life

Pearl A. Dykstra

Today's older adults have lived through many social changes: increased longevity, educational expansion (particularly for women), and the development and subsequent retrenchment of the welfare state. They experienced growing gender equality, the divorce revolution of the 1970s, the transformation of traditional marriage, and the greater acceptance of relationship types other than marriage. Most of the research on marriage has focused on relatively young couples and has given greater attention to marriages that dissolve than to marriages that stay together. The goal of this chapter is to review scholarship on later-life partnerships, moving beyond marriage to also considering cohabitation and Living Apart Together (LAT) relationships.

Intimate partnerships are a source of material support, companionship, guidance, and emotional bonding. These "relationship provisions" (Weiss, 1974) contribute to healthy ageing. The extent to which people benefit from having a partner depends on the quality of their unions (Proulx et al., 2007; Robles et al., 2014). High-quality partnerships offer health benefits, while poor-quality partnerships may be detrimental to well-being. Following that premise, I address three questions. The first focuses on marital quality in later life. How does the quality of later-life marriages compare to that of earlier stages of the marital trajectory? The second question concerns the diversity among later-life partnerships. What is known about differences in the quality of first marriages, remarriages, cohabitations, and LAT relationships? Given the paucity of research on same-sex relationships at later life course stages, the focus will be on opposite-sex relationships. The third question focuses on the later-life transitions and partnership quality. How do transitions that are particular to older adulthood (health problems and retirement) affect the quality of partnerships? Before addressing these questions, I provide demographic information on later-life partnerships.

14.1 DEMOGRAPHICS OF LATER-LIFE PARTNERSHIPS

As societies are ageing, an increasing number of partnerships are later-life, long-lasting relationships. Golden wedding anniversaries are not as exceptional as they used to be. Never before have so many in first marriages been together for 50 years or more, despite increasing divorce rates (Kreider and Ellis, 2011; Statistics Netherlands, 2019; Sundström, 2002, as cited in Johansson et al., 2003). In the Netherlands, 28 per cent of marriages contracted in 1951 were still intact 50 years later (in 2001), whereas 45 per cent of couples who married in 1969 were still together in 2019. One of the factors contributing to the high chances of joint survival of spouses is the relatively young age at marriage in the 1950s and 1960s (Jelnov, 2023). Another is the improvement in old age survival (Vaupel, 1997). Moreover, the life expectancy of men, who tend to be slightly older than their wives and die slightly earlier, has risen faster than women's in recent decades (Trovato and Lalu, 2010). As a result, both spouses have become more likely to be alive after 50 or 60 years of marriage. This trend may be intensified in future

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cohorts as they age, since first marriages are becoming more educationally homogamous and marriages among those with higher education tend to be more stable (Hendi, 2019).

Living as a couple is the most common type of household arrangement for older people in industrialized societies. In Europe, Labor Force Survey data from 2020 show that 50 per cent of adults aged 65 and over live with a spouse or partner (and sometimes also with children), 31 per cent live as a single adult, and 19 per cent live in an "other type" of household (Eurostat, 2021). Comparable figures from the 2016 General Social Survey indicate that 49 per cent of Americans aged 60 and over live as a couple, 27 per cent live alone, and 23 per cent are part of an "other type" of living arrangement (Ausubel, 2020). Though marriage remains the most widely prevalent, later-life partnered relationships are characterized by increasing diversity (Bildtgård and Öberg, 2017). Repartnering rates after divorce or widowhood are high (Cherlin, 2017; and Ivanova, Chapter 13). Common alternatives to marriage are unmarried cohabitation, Living Apart Together (LAT) and non-heterosexual relationships. More and more older adults have complex relationship biographies: having remarried after divorce or widowhood, sharing a household without being married, or living single by choice.

Lifelong singlehood is rare: 2016 data from the American Community Survey show that fewer than 10 per cent of adults aged 60 and older had never married (Mayol-García et al., 2021). Bellani et al. (2017) provide a more accurate estimate, focusing on coresidential partnership history rather than official marital status. Pooling data collected between 2002 and 2014 in the European Social Survey and the European Values Study, the authors find that 5 per cent of respondents had not lived with a partner (married or unmarried) by the age of 40.

Living as a single adult should not be equated with being unpartnered. LAT relationships (see Régnier-Loilier, Chapter 9) are gaining popularity among older adults, particularly among those who are starting a new intimate relationship (Benson and Coleman, 2016; Connidis et al., 2017; De Jong Gierveld, 2004). LAT relationships are more established in Europe than in North America or Australasia (statistics for other world regions are virtually non-existent). The specific circumstances of later life, such as the desire to maintain amiable ties with adult children or to protect an inheritance, as well as a preference for social and financial independence and a reluctance to become a caregiver again are key reasons why the partners maintain separate residences (De Jong Gierveld, 2002; Malta and Farquharson, 2014). LAT relationships still involve relatively few individuals in later life. Using Generations and Gender Survey data collected between 2005 and 2008 in seven Western and Eastern European countries, Ayuso (2019) arrives at an estimate of 1.5 per cent of adults aged 60 and over being in LAT relationships. On the basis of 2017 General Social Survey data, Tang et al. (2019) report that 1.5 per cent of Canadian older adults aged 65 and over are in LAT relationships, while an additional 0.5 per cent are living alone because their partner is in a nursing home. Mauritz and Wagner (2021) find a higher prevalence in a sample of German adults aged 80 and over. Data from the 2016–2018 survey Quality of Life and Subjective Well-Being of the Very Old in North Rhine-Westphalia reveal that 4.7 per cent are involved in a LAT relationship, while 8.4 per cent are not living with their spouse. The authors argue that a coresidential partnership might turn into a LAT relationship unintentionally because one partner has to move to a residential facility for health reasons.

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14.2 MARITAL QUALITY IN LATER LIFE

A dominant view in the literature is that the trajectory of marital quality follows a U-shaped curve: the happiness highs of the early years of marriage are followed by a drop in the middle years and then an increase in the later years (Miller, 2000; Kanter et al., Chapter 22). Cross-sectional studies tend to support this view (e.g. VanLaningham et al., 2001), but they have distinct weaknesses. First, there is an issue of selection. At younger ages, couples headed for divorce are not distinguished from those who remain married. At older ages, samples may be biased from the attrition of unhappy, dissolved marriages (Glenn, 1990). Second, cohort effects cannot be ruled out. Older couples may have entered their marriages with lower expectations and less conflict over gender roles than those who married more recently (Glenn, 1998). Moreover, they may have settled for less satisfying relationships given the lower acceptance of alternatives such as unmarried cohabitation and remaining single (Thornton and Young De-Marco, 2001).

Not surprisingly, given the time and financial investments that are required, there is a lack of longitudinal data covering longer marital durations at multiple points in time. (There is also a dearth of information on the course of non-marital ties.) One of the more sophisticated analyses involves six waves of data collected over a 20-year period (1980–2000) from the Marital Instability over the Life Course (MIOLC) study in the United States (Amato and James, 2018). Those who remained continuously married (33 years on average), showed a substantial decline in discord over time, a frequency of shared activities that returned to where they were at the beginning of the marriage, and relatively stable levels of happiness. Findings are in support of a marital resilience model (Walsh, 2003) rather than a decline and uprise model. Over time, couples who remain together manage to maintain the generally positive dynamics that characterize the early years of their marriage.

Life course concepts, with their emphasis on shifts in the lives of individuals that involve their roles in a number of different institutions, can help explain why older spouses tend to be satisfied with their marriages (Aldous, 1990). For parents, the departure of children from the home brings fewer household burdens, increased privacy, and a sense of accomplishment. Retirement reduces work-related stress and increases the amount of time partners spend together. The onset of health problems in one or both partners is an opportunity to demonstrate concern and caring. All of these transitions bring partners into closer contact with one another, which is seemingly beneficial for those in high-quality relationships, but potentially disruptive for those in unhappy relationships (Lin et al., 2018). Note, however, that older husbands tend to report better marital quality than their wives do (Stokes, 2017).

Socioemotional selectivity theory (SST) provides another perspective on why marital quality is quite positive in later life (Carstensen et al., 1995). One line of reasoning is that older adults are more selective about which relationships they choose to invest in during later life, favouring emotionally rewarding ties. Another line of reasoning is that as spouses age, they become less emotionally reactive to conflict and marital difficulties. They also become more appreciative of the partner's positive traits and less fixated on negative traits, which is beneficial to marital quality.

In contrast, the decremental model of ageing (Rosow, 1973) stresses the challenges of later-life transitions for marital quality. The loss of roles from which older adults have derived their sense of accomplishment (e.g. departure of children from the parental home, labour force exit, diminished independence as the result of chronic illnesses) produces a decline in morale

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which in turn undermines the conditions for marital happiness. From the "role loss" vantage point, the couple's ability to find and develop meaningful alternative roles, including satisfying shared activities, is crucial to coping with the stresses in their marriage.

It is important not to overlook differences among married older adults. Gender relations intersect with other social positions based on race, ethnicity, class, and sexual orientation to structure partnership experiences (Calasanti and Kiecolt, 2007). Several typologies of *very long-term* marriages have been developed. Weishaus and Field (1988) used four rounds of in-depth data collection from the Berkeley Older Generation Study (the first from 1928 to 1929, the most recent from 1982 to 1984, at which time the mean duration of the marriages was 58.3 years). At each wave, the wives and husbands were interviewed separately. Analyses of the interview protocols and interviewer ratings revealed four types of cross-time sequences of marital quality in very long-term marriages: stable positive, stable neutral, stable negative, and curvilinear. Cohen et al.'s convenience sample (2010) also involved data from both spouses but collected at a single point in time and based on an existing marital satisfaction scale. The couples in their Israeli study had been married on average for 50 years. Three clusters came forward: vitalized marriages, satisfactory marriages, and conflictual marriages. Margelisch et al. (2017) used data from continuously married individuals who participated in a representative longitudinal survey carried out in 2012 and 2014 in Switzerland. Two distinct types of marriage (which had mean duration of 49.2 years at the start of the study) emerged: happily and unhappily married couples.

14.3 QUALITY OF DIFFERENT TYPES OF LATER-LIFE PARTNERSHIPS

There is not much research on differences in relationship quality between *first and higher order marriages* among older adults. To my knowledge there are no studies that have tracked the quality of first and higher order marriages of the same group up until advanced ages. The work that has been done largely originates from the United States. Information is limited because studies have tended to focus on the implications of remarriage for child well-being rather than examining relationship quality exclusively as an outcome (Shriner, 2009). Scholars have identified a range of factors that are likely to serve as sources of strain in higher order marriages such as continued attachment to the former spouse, stepfamily complexity and economic demands associated with an earlier marriage (Jensen et al., 2014). Higher order partnerships tend to be less homogamous in terms of age, educational attainment, and race than first marriages (Lichter et al., 2022). Having fewer shared values, interests and backgrounds might complicate the development and maintenance of high-quality partnerships. Empirical studies show mixed findings. Using data from the second wave (2010–2011) of the National Social Life, Health, and Aging Project (NSHAP), Cooney et al. (2016) find no differences in relationship quality between first and higher order marriages. A similar pattern is reported by Lewin (2017) in research based on the first wave of the National Social Life Health & Aging Project (2005–2006). However, Kaufman and Taniguchi (2006) find less happiness in second or later marriages than in first marriages in a study using data from the 1994 Iowa Youth and Families Project panel on grandparents. One explanation for these mixed results might be the different ways in which marital quality is measured (Shriner, 2009; Kanter et al., Chapter 22).

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Given the increasing popularity of non-marital partnerships (see Hiekel, Chapter 6; and Régnier-Loilier, Chapter 9), there is a growing body of literature comparing the well-being of individuals in married, cohabiting and LAT relationships in early and midlife (Evans et al., 2023). Much less is known about the quality of these different types of partnerships in later life. One distinctive feature is that nearly all older adults in cohabiting and LAT relationships have been previously married (Brown et al., 2006; Liefbroer et al., 2015). A perusal of the literature reveals competing hypotheses regarding differences in relationship quality between the different later-life partnership types. If one takes commitment as the point of departure (Lewis, 2001), then marriages and remarriages emerge as high-quality partnerships. The idea is that marriage acts as a public statement of commitment, a moral obligation to invest in the partnership and to resolve conflict. Cohabitation and LAT relationships entail private commitment, which is continued as long as there is sufficient satisfaction for both individuals (Beck and Beck-Gernsheim, 1995). The alternative hypothesis follows from this notion of private commitment. If one takes individual freedom as the point of departure (Bildtgård and Öberg, 2017), then cohabitation and LAT relationships emerge as the high-quality partnerships. Not being subject to legal, normative and financial restraints (given pensions and old-age security), older people can presumably shape their relationships according to their own preferences.

Research on this topic (insofar it exists) shows few differences in quality among co-residential unions, but LAT relationships seem to be quite distinct (a pattern that is also observed at earlier stages in life; see Evans et al., 2023). Using data from the first wave (2005–2006) National Social Life, Health, and Aging Project (NSHAP), Brown and Kawamura (2010) find that cohabitors and remarrieds do not significantly differ in terms of emotional satisfaction, pleasure, openness, time spent together, criticism, and demands. However, cohabitors are less likely than remarrieds to report that their partnership is very happy. Using the same set of cross-sectional NSHAP data, Lewin (2017) compared LAT relationships with marriage, remarriage, and cohabitation. LAT relationships scored the lowest on all the measures of relationship quality (happiness, support, and strain). Though the differences between LAT relationships and marriages (first and higher order) were significant, those between LAT relationships and cohabitation were not. The absence of longitudinal data makes it impossible to disentangle the causality between partnership type and relationship quality. Do older adults refrain from stronger partnership commitments (getting married, starting to live together) because of a lack of closeness in their relationship? Or, does living in separate households inhibit investments in activities that might lead to greater relationship quality?

Lewin (2017) notes that more committed relationships provide more benefits (happiness and support), but also have more strain. Given high levels of interdependence, the coexistence of happiness and strain is inevitable in close relationships (Rook, 1998). Using pooled data from the 2010 and 2012 Health and Retirement Study, Wright (2020) also examined positive and negative features of relationship quality. His comparison of cohabitors and remarrieds revealed few differences across both dimensions. A tentative conclusion is that in later life, cohabitation is not "just" living together, but a step in a journey of commitment (Berrington et al., 2015; Perelli-Harris and Bernardi, 2015).

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14.4 LATER-LIFE TRANSITIONS AND PARTNERSHIP QUALITY

Older adulthood is marked by challenges that are particular to this stage in the life course. Here I consider the ways in which partnership quality in the later years is responsive to the experience of life transitions. I decided not to look at entering the empty nest phase. A considerable body of research has dispelled the myth of the departure of children from the parental home as a pervasive and predominantly negative experience for parents, and mothers in particular (Bouchard, 2014). Instead, I focus on the onset of chronic illness and disability, and retirement because these topics are theoretically and empirically best developed.

14.4.1 Health Problems

With age, the health problems of older people become more complex and chronic (Rudnickaa et al., 2020). Declining health can fundamentally alter partnership dynamics as later-life partners adapt to a new reality. Unfortunately, the research that has been carried out does not offer a clear understanding of the ways in which changes in health and disability affect marital quality at advanced ages. Many studies focus on specific ailments (e.g. diabetes, cancer, heart disease, dementia; see Walker and Luszcz, 2009), making it difficult to detect clear patterns. The myriad ways in which marital quality is assessed (subjective appraisals, couple interactions, positive versus negative dynamics) hamper drawing comparisons across studies (Burman and Margolin, 1992). Much of the research has relied on cross-sectional analyses that are not able to unravel the time ordering of health and marital quality effects (Kulik, 2016). The plethora of studies on caregiver burden rarely addresses how the stress experienced by one partner crosses over to the other partner, requiring both partners to negotiate shifting roles and expectations (Tracy and Utz, 2020).

The dyadic stress and coping framework (Lee and Roberts, 2018) is often applied to understand what health changes mean for the partnership. Declines in health put into play a cascade of both minor and major potential stressors which have adverse effects on the relationship's overall quality.

A couple's daily routines may no longer be viable due to functional impairment of one of the partners, financial strains, illness management activities, and psychological struggles. There might be a decrease in the shared leisure activities that the couple finds rewarding. Resources "internal" to the couple such as humour and the reciprocation of kindness, and "external" resources such as assistance from peers and professionals have an impact on coping success. Moreover, each partner's coping efforts have an impact on the other in some way, and through their interdependence these efforts affect the partnership itself. Empirical work has largely focused on establishing the associations between health and marital quality rather than the dyadic coping. Illustrative examples are provided below.

Caring for an ailing partner is often seen as an extension of the affection and support that has been exchanged for many years out of a combination of love and duty (Davidson et al., 2000). Although caregivers endure considerable challenges, there are also positive outcomes for them, such as feeling respected and esteemed and being important to others.

An elegant longitudinal study carried out by Yorgason et al. (2008) reveals that the association between health and marital quality differs for men and women, and by whether the change in health and disability occurs to the respondent or to the spouse. Data came from four waves of a 20-year longitudinal study (1980–2000) of a national US sample of married individuals.

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Self-reports of declines in health had modest negative effects on marital quality, whereas reports that individuals' spouses experienced declines in health were related to more extensive drops in marital quality. This was especially true when wives were reporting health declines in their husbands. Whereas husbands' reports of wives' disability were linked to increases in marital quality, wives' reports of husbands' disability were not. The authors do not provide an explanation for why the onset of disability led to improvements in marital quality, whereas declines in self-rated health did not. In their discussion of study carried out by Yorgason and colleagues, Gallagher and Stokes (2021) argue that the findings follow the pattern predicted by Socioemotional Selectivity Theory (SST). Disability creates a reduction in one's own future time perspective, triggering the concentration of time and effort on those who are dearest, such as a spouse.

More recent studies have collected data from both members of the older couple. Gallagher and Stokes (2021), for example, addressed the question of how age-related problems with cognitive functioning may be associated with perceptions of marital quality among older spouses. They used cross-sectional data from the 2016 wave of the Health and Retirement Study, wherein both members of coresident married heterosexual couples also completed the leave-behind questionnaire. Findings revealed that husbands' reports of marital quality were not sensitive to the cognitive functioning of either spouse. Results showed furthermore that wives reported greater marital quality when their own cognitive functioning was poorer. Gallagher and Stokes put forward that husbands might be providing additional help to their cognitively impaired wives who, as a result, evaluate their marriages more positively. Last, findings showed that wives reported worse marital quality when their husbands' cognitive functioning was poorer, suggesting that wives carry the emotional burden of watching over both their own and their husband's well-being.

Korporaal et al. (2013) also find that husbands' characteristics are more consequential for wives' reports of marital quality than the reverse. Their study is based on data from the Care-study (2000–2001), a side-study of the Longitudinal Aging Study Amsterdam (LASA). Interviews were held with physically impaired, independently living older adults and their spouses. For wives, results showed that marital satisfaction was negatively associated with spousal health problems, but only under the condition that their own health was relatively good. For husbands, marital satisfaction was associated neither with their own health nor with spousal health problems. Iveniuk et al. (2014) report parallel gender differences. Wives with husbands in fair or poor physical health were more likely to report high levels of marital conflict, but the reverse was not true. Their data are from the second wave of the National Social Life Health and Aging Project (NSHAP), a nationally representative sample of older married and cohabiting couples in the US (2010–2011) with data on both partners.

A particularly insightful analysis of how older couples make sense of a marital reality where both spouses are experiencing complex morbidities was carried out by Radcliffe et al. (2013). Joint biographical narrative interviews were held with stroke survivors recruited from the South London Stroke Register (SLSR) and their spouses. Three narrative styles emerged. The first is that of the "united couple", where spouses presented themselves as a team who were dependent on each other and managing life well. The second is that of the "positive carer", where spouses presented themselves as a self-reliant couple with the wife willingly caring for the husband. Both spouses emphasized that the wife was the best person to care for the husband. The third is that of the "frustrated carer", with mainly a conflictual style of interaction and an emphasis on the disruption that the stroke had brought to their lives. The

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authors observe that husbands and wives appeared to engage equally in the construction of the narratives. Further studies might examine variation in the kind of interaction that occurs at different stages of managing the challenges of disability and for different socioeconomic and cultural groups.

14.4.2 Retirement

Popular images of the "husband underfoot" syndrome (Barnes and Perry, 2004; Bushfeld et al., 2008) suggest that retirement has negative effects on partnerships. Supposedly, the husband's increased presence in the home disturbs the wife's daily routines and sense of autonomy, increasing the likelihood of conflicts. Research shows otherwise. A recent overview (Mergenthaler and Cihlar, 2018) concludes that the retirement transition *generally* has no direct effect on marital quality, but there are effects for specific groups. For example, not-yet-retired women still in their primary career jobs report higher marital conflict if their husbands are no longer employed (Moen et al., 2001). Apparently, the failure to enact traditional gender-role arrangements detracts from marital harmony.

Mergenthaler and Cihlar (2018) point out that the studies in their overview have methodological shortcomings: small sample sizes, cross-sectional designs, and non-random sample frames. There is also a reliance on data collected only from one partner. Most of the data were collected in the 1990s or earlier. Since then, employment patterns have undergone drastic changes. There has been a rise in women's labour force participation, and the boundary between employment and retirement is blurred, with a growing number of individuals transitioning into and back out of retirement in response to financial, family and health demands.

Work by Krihdal and Duvander (2023) provides a starting point for exploring whether the link between retirement and marital quality has changed in recent decades. Their study, which involved older respondents in the Swedish Gender and Generations Survey 2012–2013, focused on three routes towards achieving individual relationship satisfaction: relative resources (the better bargaining position), adherence to traditional gender roles, and pooling money (as equalizer). Findings showed poorest marital satisfaction when both partners were gainfully employed (which is contrary to the relative resources prediction), and highest marital satisfaction when both partners were retired or when the man was gainfully employed and the woman was retired (which is consistent with traditional gender roles). Couples where the woman was gainfully employed and the man was retired had intermediate levels of marital satisfaction. Pooling resources made no difference for the marital satisfaction in couples where both partners were gainfully employed, but it raised the level of marital satisfaction to that of the retirees for couples where the woman was gainfully employed and the man was retired. The authors conclude that pooling money helps maintain marital satisfaction in couples which do not adhere to traditional gender roles. It supposedly no longer matters who brings the money to the household, reducing the stress in gender non-conforming couples.

14.5 CONCLUSION

The majority of older adults have or live with a partner, but not necessarily with the person with whom they started their partnership trajectory. Marriage is the most common type of partnership. Couples who have remained together for 40 years or more show relatively stable

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levels of happiness, but the set points of happiness vary. Older adults' partnership biographies show increasing diversity. The reported quality of higher order marriages and cohabitations parallels that of first marriages. LAT relationships appear to stand out: their evaluations tend not to be as high as those of other intimate partnerships. I am not aware of any longitudinal studies that show the actual care commitments between LAT partners when faced with the challenge of a seriously ill partner. Do they move in together to reduce the complexities of providing care across a physical distance? Do they locate other sources of care and support? Such questions need to be addressed in future research.

Contrary to popular images, transitions such as retirement and the empty nest tend not to upset the dynamics in later-life partnerships. Nevertheless, there is evidence of tensions in specific circumstances, for example, when partners experience difficulties building an identity after the transition (Bouchard, 2014; Mergenthaler and Cihlar, 2018). Researchers need to continue identifying factors that moderate the ways in which couples experience later-life transitions. There is also a need for examinations of the combined effects of stressors.

Virtually all of the literature on later-life partnerships focuses on the effects of partnership quality on health (e.g. Umberson et al., 2006), rather than the reverse. As this chapter has shown, there are good reasons to explore the ways in which health may affect partnership quality. One of the patterns in this body of literature is that women's marital quality appears to be more strongly related to their partner's decline in health than men's. Given that women tend to have partners who are somewhat older than they are, they are also more likely to be exposed to a partner with health declines, leading to a double deficit. Gendered norms and expectations about the provision of help and support in later-life partnerships further contribute to greater caregiver stress, strain, and burden among women than men (Revenson et al., 2016). Whether public care arrangements provide a solution to women's greater vulnerability is uncertain (Schenk et al., 2014).

Looking back on the publications that have been considered in this chapter, I see improvements in the quality of the research that has been carried out. In their review of studies on the health and relationship dynamics of later-life couples, Walker and Luszcz (2009) noted an absence of integration with relevant theory and a paucity of longitudinal studies. My reading of the recent literature is that more and more work is moving beyond cross-sectional data, includes data from both partners, and expands upon key theoretical perspectives. Another promising development is that in-depth analyses increasingly draw upon samples that have been purposefully selected from large-scale representative populations. Nevertheless, three distinct weaknesses remain. The first is a tendency to develop one's own measures rather than use standardized measures of marital quality. The result is a lack of comparability across studies. The second weakness is the focus on "traditional" couples (heterosexual, native-born, sharing a household, with children). Childless, migrant, interethnic, same-sex, and long-distance partnerships disappear out of sight. Researchers need to be open to increasing diversity in partnerships as new cohorts enter later life. The third weakness is inadequate attention for the broader life conditions surrounding a couple, such as quality of housing, neighbourhood cohesion, and access to services. It is crucial to move beyond the marital dyad level (and the dynamics within the dyad) to gain an understanding of how to better facilitate couples' quality of life at advanced ages.

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15. Widowhood and grey divorce

Michaela Kreyenfeld and Sarah Schmauk

While divorce statistics are often very limited and are sometimes of poor quality (Mortelmans, 2020a), there is consistent evidence that divorce is undergoing profound changes. In their seminal paper, Brown and Lin (2012) reported for the US a doubling of the divorce rate at ages 50 and older between 1990 and 2010. This trend can be attributed in large part to the overall postponement of marriage in recent decades (Mortelmans, 2020a), as well as to high divorce rates among re-married people (Lin and Brown, 2021). Nonetheless, it appears that there has been a genuine rise in divorce rates at higher marital durations. For example, in Germany between 2000 and 2018, divorce rates increased by roughly 10 per cent among couples who had been married for 20 years or longer, while they declined among couples who had been married for shorter durations (BiB, 2022). Similar trends have been reported for other European countries (e.g., Cimelli et al., 2021; Solaz, 2021). This "grey divorce revolution" has established a new field of inquiry (e.g., Brown and Lin, 2012; De Shane and Brown-Wilson, 1982: 89; Lin et al., 2022; Zilincikova and Schnor, 2021).

From a demographic perspective, the death of a partner and union dissolution are competing events that terminate a union. Although they both mark the endpoint of a partnership, their consequences are usually examined in two different strands of literature. For scholars of separation and divorce, the focal point of interest has been the repercussions of union dissolution for labour market outcomes. For example, studies have examined how unemployment (e.g., Kalmijn, 2005), employment (e.g., Andreß et al., 2006), individual earnings (e.g., Raz-Yurovich, 2013), and equalised household income (Boll and Schüller, 2021; Bonnet et al., 2021) are affected by the breakdown of a marital or a non-marital union. Furthermore, a large body of literature has investigated the adverse effects of separation and divorce on children's performance (e.g., Amato, 2000; Amato and Cheadle, 2005) and parental wellbeing (e.g., Kreyenfeld and Trappe, 2020). While scholars in this area of research have tended to focus on concerns and issues that typically arise in midlife, the impact of the loss of a partner due to death has mostly attracted the attention of scholars who are more active in ageing or health research. There have, for example, been studies examining how widowhood influences life satisfaction (Infurna et al., 2017), mental and physical health (e.g., Cavapozzi et al., 2020), care needs and institutionalisation (e.g., Nihtilä and Martikainen, 2008), and mortality (e.g., Martikainen and Valkonen, 1996). While these two strands of literature have been largely separate in the past, recent trends in grey divorce research have brought them closer together.

The goal of this chapter is to compare studies that have examined the consequences of widowhood on individuals' health and economic wellbeing with the existing results on the consequences of grey divorce. The death of a partner and divorce are both life course risks that endanger the economic sustainability of a household, particularly if the household mainly relied on only one income. This is especially true for the cohorts who are experiencing the onset of the "grey divorce revolution", that is, women and men who were born in the 1950s and 1960s, and are now approaching retirement age. In many European countries, these cohorts are more likely than more recent cohorts to have practised a gendered division of

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labour while married. Thus, the consequences of grey divorce may be specific to these older cohorts, and may change as the younger cohorts reach old age. This chapter also describes how the welfare state mitigates some of the adverse effects that divorce and the death of a partner have on individuals' economic wellbeing at advanced ages. It concludes with a discussion of the possible challenges of and avenues for future research in this area.

15.1 DEATH OF A PARTNER, HEALTH, AND ECONOMIC WELLBEING

15.1.1 Death of a Partner and Mortality

There is a long tradition in demographic research of examining the relationship between widowhood and mortality (Willekens et al., 1982). A consistent finding from this literature is that such patterns are strongly gendered, with men being more affected than women by the death of a spouse (e.g., Moon et al., 2011; Murphy et al., 2007; Shor et al., 2012; Sullivan and Fenelon, 2014). Male excess mortality after a spousal death is usually attributed to the loss of routines and the support that comes with marriage. Couples monitor and control each other's health behaviour and lifestyle habits, such as their alcohol and tobacco consumption, diet, sleep patterns, and intake of medicine. It is usually assumed that women have a stronger influence than men on their partner's behaviour (Umberson, 1992; Umberson et al., 2018). Moreover, due to gendered care patterns, women are more likely to be the sole care giver for their partner, while men are more likely to rely on additional external support when their spouse becomes fragile and in need of care (Bertogg and Strauss, 2020). Given men's greater reliance on spousal care, the death of a partner may be more detrimental for men than for women (Casanova, 2021; Nihtilä and Martikainen, 2008). There are also indications that these patterns differ by age, with male excess mortality being higher at younger ages (Moon et al., 2011). Moreover, data for the US show that race is a relevant moderator, with the mortality rate of black women being less affected by the death of a spouse than that of white women (Elwert and Christakis, 2006). A recent study for Sweden also examined differences in male excess mortality by socio-economic status, and found that high-status men are particularly likely to be affected by the death of a partner (Dabergott, 2022). The adverse effects of spousal death on the widowed partner's mortality attenuates strongly over time (Berntsen and Kravdal, 2012; Moon et al., 2011). Furthermore, re-partnering and re-marriage seem to lower the mortality rates of widowed individuals (De Jong Gierveld, 2004: 236). However, concerns have been raised that the latter finding is primarily the result of selection (Lillard and Panis, 1996; Sheps, 1961).

15.1.2 Death of a Partner and Health

A related and equally large body of research has shown that the death of a partner substantially lowers an individual's subjective wellbeing and life satisfaction (Clark et al., 2008; Infurna et al., 2017; Nakagawa and Hülür, 2021). Infurna and colleagues (2017) showed that widowhood has more adverse effects on life satisfaction at younger than older ages. The authors further assumed that widowhood is more detrimental for men than for women because women have "more supportive social relationships beyond the spousal bond" (ibid: 905). However, empir-

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ical research on this question did not uncover any major gender differences in life satisfaction after widowhood (Clark et al., 2008).

Medical research has contributed to our understanding of how widowhood relates to health outcomes, with most of this research being focused on the detrimental effects of widowhood on mental wellbeing and depression (see Kristiansen et al., 2019 for a meta-analysis). While there are consistent findings showing that widowhood is often associated with depressive symptoms and with a diagnosis of clinical depression, no major differences in these patterns by gender or age have been reported (Kristiansen et al., 2019; see, however, Yu et al., 2021 for contradictory findings). Indeed, it is conspicuous that mortality research has provided such strong and solid evidence of gendered patterns in the effects of widowhood, while there are no consistent findings with respect to life satisfaction or mental health. A possible explanation for this apparent discrepancy is that epidemiological studies often draw on medical reports that are affected by gendered patterns in the diagnosis of mental diseases (Angst and Dobler-Mikola, 1984; Chapman et al., 2013; Spencer and Grace, 2016). Selective mortality is another potential source of bias that is rarely addressed in studies that deal with mental health and life satisfaction (Yu et al., 2021: 234). In addition to demonstrating the impact of widowhood on mental health, scholars have shown that widowhood increases the risk of developing cardiovascular diseases and dementia, and accelerates cognitive decline (Zhang et al., 2021). Moreover, reduced recovery rates from diseases such as cancer or stroke after widowhood have been reported (Dupre and Lopes, 2016).

15.1.3 Death of a Partner, Economic Wellbeing, and the Welfare State Context

Compared to the large body of research on the impact of widowhood on health, research on the economic consequences of the death of a partner is still relatively scarce. A consistent finding from the existing literature is that widowhood is more detrimental for women's than for men's economic wellbeing. After the death of a partner, women tend to experience a larger drop in household income than men (Ahn, 2005; Streeter, 2020), and are more likely to be at risk of poverty (Gillen and Kim, 2009). While evidence of this gender gap has been found across countries, its magnitude varies considerably depending on the context (Ahn, 2005). The key factors that explain these country differences are the prevalent earner models and the generosity of survivors' pensions, with the two being closely intertwined. Conservative welfare states that support the single earner model, such as Germany, are also the countries that still offer survivors' pensions. Meanwhile, countries that support the dual earner model, such as Sweden, have abolished or strongly curbed such pensions.

The close connections between pension regulations, gender role assumptions, and social class are probably most evident in conservative welfare state contexts. In Germany, for example, survivors' pensions were introduced as early as 1911, but they were initially reserved for women only (Frey et al., 2015; Schmähl, 2018). Men had access to these payments only in exceptional circumstances. In addition, regulations differentiated between the spouses of workers and employees. Employees received the payments unconditionally, while payments to the spouses of workers depended on their "employability" and number of children (Schmähl, 2018). Although the differences between the spouses of employees and workers were eventually harmonised, it is interesting to note that working-class women were assumed to be capable of economic self-reliance. In 1985, after the intervention of the German constitutional court, men also became eligible to receive survivors' pensions. Since then, however, survivors' pen-

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sions are no longer unconditional, but instead depend on the widowed spouse's own income. The German case illustrates how strongly the male breadwinner model and assumptions of class-specific female employment patterns were engrained in the fabric of welfare state regulations. In recent years, several countries have either increased eligibility thresholds, curbed payments, or basically abolished survivors' pensions (Sweden and Latvia).[1] By contrast, other countries have expanded these pension benefits to cover cohabiting unions (OECD, 2018).

15.2 GREY DIVORCE: AN EMERGING FIELD OF INQUIRY

15.2.1 Health and Grey Divorce

While studies on the consequences of widowhood are typically anchored in ageing research, divorce research has mainly focused on "midlife", raising the question of whether prior evidence on the consequences of divorce can be translated to "grey divorce". Prior empirical evidence shows that divorce is related to low life satisfaction and subjective wellbeing (Clark et al., 2008) and to increases in depression (Zhang et al., 2016; Zulkarnain and Korenman, 2019). Only a few studies have compared early and late life divorce, but the few studies that exist reveal a rather uniform pattern across age at divorce. Similar to the findings for spouses who divorce at younger ages, longitudinal evidence show that spouses' depressive symptoms are already elevated in the years prior to a grey divorce, which points to strong health-related selection into divorce (Lin et al., 2019; Tosi and van den Broek, 2020).

What distinguishes the effects of early divorce from those of late divorce is that disease structures shift with age. With the "greying of divorce", the focus moves to the risk of developing diseases other than depression, such as cardiovascular diseases, cancer, and dementia. In this context, it has been shown that divorce affects individuals' chances of surviving cancer (Yuan et al., 2021) and recovering from stroke and other cardiovascular diseases (Molloy et al., 2009), and accelerates the onset of cognitive decline and dementia (Liu et al., 2019). The mutual social support provided by partners and dyadic coping are key mechanisms that explain the differences in the health outcomes of divorced and married individuals (Gellert et al., 2011; 2018). These results resonate with the findings of studies that examined differences by marital status in individuals' levels of isolation, emotional wellbeing, and loneliness at advanced ages (e.g., Carr and Utz, 2020; Crowley, 2018; Dykstra and Fokkema, 2007; van Tilburg et al., 2015).

Uncertainty reigns over the role of gender in respect to the health-related consequences of grey divorce. The assumption is that men are especially vulnerable, as they "typically have weaker social networks prior to divorce" (Carr and Utz, 2020; Klaus, 2021). However, evidence of such a "male social penalty" after a grey divorce is mixed (see, e.g., Crowley, 2018 for the US, and Högnäs, 2020 for the Netherlands, for conflicting evidence). There is evidence from the US that grey divorce is more likely to increase the mortality risk of men than of women (Bulanda et al., 2016). However, Sbarra et al. (2011) did not report consistent patterns in their meta-analyses.

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15.2.2 Economic Ramifications of Divorce

The burgeoning literature on grey divorce is particularly motivated by the assumption that the economic self-reliance of women after divorce cannot be taken for granted. Instead, it is generally assumed that divorce is especially economically detrimental for women at advanced ages, as they have relatively little leeway to adjust to the marital breakdown. The typical "coping strategies" of divorcees, such as re-partnering, expanding employment, or returning to the parental home, are not available to the same extent at higher ages (Mortelmans, 2020b). Women are at a disadvantage, as the partner market becomes tighter for women with increasing age, limiting their option to re-partner (e.g., Brown et al., 2019). Furthermore, women's options to re-enter the labour market or to switch occupations or career tracks may be more limited or non-existent if they have only a few years left until retirement or are already retired (Lin and Brown, 2021). Women are also more affected than men by the legacy of a gendered division of work during marriage, which is widespread among the birth cohorts who are now around retirement age. As a result, women who divorce at advanced ages may find it difficult to adjust economically, let alone to catch up after the years they spent being a homemaker (Canham et al., 2014).

However, the existing studies on the economic ramifications of grey divorce do not provide conclusive evidence. In a study based on US data, Slavov and Wei (2021) reported that women's employment increased after grey divorce, while men's employment declined. A French study corroborated these findings by showing that the increase in labour force participation among women following divorce was almost double that among men (Cimelli et al., 2021: 28). The results also indicated, however, that equalised household income decreased more among women than among men, and that this decline occurred across all ages, but was largest in cases of grey divorce (ibid.: 16).

The findings for the effects of grey divorce on retirement transitions are also rather mixed. While divorce was shown to be unrelated to retirement transitions in a study based on US data (Berkowicz, 2019), Cimelli and colleagues (2021: 28) reported a delay in retirement transitions among divorced women and men in France. Furthermore, a growing body of literature has investigated how wealth is affected by a marital breakdown (Kapelle and Baxter, 2021). Studies for the US have found that divorce results in a drop in wealth, with the effect being particularly severe for women at advanced ages (Crowley, 2018; Sharma, 2015; Wilmoth and Koso, 2002). Hence, women seem to pay a higher "grey divorce penalty" than men.

15.2.3 The Welfare State Context and the Economic Consequences of Divorce

While the loss of a spouse through death is a genuine risk factor for households that has been addressed since the origin of the modern welfare state, divorce and separation rates are still considered "new social risks" (Bonoli, 2005). They started to increase at a time when welfare states were already solidified, and several countries had entered a period of retrenchment of their social policy expenditure. Furthermore, survivors' pensions are usually included in social law and benefits are covered through social security funds or taxes. Divorce is regulated by civil law. In addition to addressing child custody and alimony (Beaumont et al., 2014), civil law regulates matrimonial rights, and thus establishes the rules and regulations on how joint property and wealth are divided upon divorce (Rotino, 2017). National family laws differ greatly with respect to how they regulate the separation of property in the event of divorce

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(Kapelle and Vidal, 2022). How women and men "trade" different assets in the divorce process also differs across countries. For example, a study from Belgium showed that women are more likely than men to remain in the family home after a grey divorce (Zilincikova and Schnor, 2021). No solid and comparable evidence exists on whether and to what extent these patterns are the result of bargaining processes through which, for example, housing property is traded against pension entitlements. Moreover, we have very little insight into how pension accounts, life insurance policies, and assets that are relevant for old age security are treated in divorce proceedings. Only a few countries (notably Germany, the Netherlands, Austria, and Switzerland) have fixed regulations in place that govern the splitting of public pension entitlements upon divorce (see Kessler, 2020; Schmähl, 2018).

Beyond the separation of property, the legal system may foresee ex-spousal alimony payments for the "weaker party" in a relationship. Many countries have increasingly adopted the strategy of a "clean break", whereby divorce is no longer followed by any long-term liabilities between the spouses (Ribot, 2011). This approach is ostensibly based in part on the underlying assumption that both partners can be economically self-reliant after a marital breakdown. While the *de jure* regulations have been compiled and are available from various sources,[2] it is unclear whether and how these regulations play out de facto. In the area of child support, there is some scattered evidence that child alimony is often not paid in full or at all (see, e.g., Hubert et al., 2020; Jaehrling et al., 2011; Skinner and Davidson, 2009). However, we have relatively little evidence of how divorce laws play out in practice in individual countries, let alone how these patterns differ across Europe. Thus, it remains unclear whether ex-spousal alimony is granted and paid in full; how property is divided; and whether property is, as noted above, traded in the divorce proceedings against claims of ex-spousal alimony payments.

15.3 CONCLUSIONS

This chapter has provided an overview of previous research on the impact of the loss of a partner at advanced ages, with special attention paid to the emerging literature on "grey divorce". While this body of research has identified important parallels between grey divorce and widowhood, it has also highlighted new risks and vulnerabilities that are particular to union dissolutions at advanced ages.

Both widowhood and grey divorce have been found to result in sharply reduced life satisfaction (e.g., Infurna et al., 2017), as well as higher depression (e.g., Yu et al., 2021; Zulkarnain and Korenman, 2019) and mortality risks (Rendall et al., 2011). Moreover, both can lead to a loss of social support (e.g., Glaser et al., 2006) and an increase in the risk of poverty, especially for women (e.g., Gillen and Kim, 2009; Zhang et al., 2016). However, unlike the death of a partner, divorce tends to be an anticipated event that is often preceded by a conflictual relationship and results from a deliberate decision of one and, in many cases, both partners. Indeed, much of the prior research on grey divorce has been focused on the adverse effects of divorce on health and economic wellbeing, while largely ignoring the reality that in many cases, divorce may be a positive turning point that ends a dysfunctional relationship (see, e.g., Kalmijn and Monden, 2006). While the death of a partner may be preceded by illness, and can thus be anticipated (Infurna et al., 2017), it is still an exogenous and undesirable event that is generally followed by a period of grief. Thus, individuals' partnership trajectories and

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conditions for re-partnering after a grey divorce may differ considerably from those after the death of a partner (Brown et al., 2019; Wu et al., 2015).

Moreover, there are systematic differences in the treatment of divorce and the death of a partner by the welfare state. While the death of a spouse is a social risk that is covered by survivors' pensions in some countries, divorce is a "private matter" that is usually addressed within civil law. In most countries, there are some compensation mechanisms for the "weaker party" in a divorce proceedings. These mechanisms can ameliorate some of the adverse consequences of a gender-specific division of labour during marriage. However, as pointed out, our knowledge on the economic ramifications of grey divorce is thin and at best inconclusive. The difficulties associated with constructing a meaningful and comparable equivalent household income, and with capturing all sources of income, including alimony payments, are well-known challenges in divorce research (Boll and Schüller, 2021). These problems are aggravated for studies on grey divorce, as scholars need to also consider the partners' income from public pensions as well as from occupational and private retirement schemes. Furthermore, the value of housing property, assets, and other types of wealth tends to grow with increasing age. However, information on these potential sources of income is either seldom collected in survey data, or notoriously suffers from inaccuracies and high item non-response.

Finally, there is little existing research on the distinct selection mechanisms into grey divorce (see, however, Kridahl et al., 2023). While selection is omnipresent in divorce research, it may differ systematically between midlife and grey divorce. This pertains to both the economic and the health-related factors that channel people into divorce at advanced ages. While depression is known to be one of the main health conditions that lowers partnership quality and selects people into divorce at midlife, there may be other diseases that dominate the selection process at advanced ages. Moreover, these patterns might be strongly gendered. For example, the female spouse being in poor health and needing care may have a more negative impact on union stability than if the male spouse requires care (Vignoli and Alderotti, 2023). Furthermore, as the prevalence of grey divorce rises, it will be increasingly difficult for researchers to ignore selection on survival. Indeed, a large share of the abovementioned "nil findings" concerning the gender differences in health, life satisfaction, and wellbeing may be attributable to the failure to take into account selective attrition in the panel surveys due to the deaths of the respondents (Yu et al., 2021: 234).

A related concern pertains to the definition of the study population. The typical threshold used to define cases of grey divorce is divorce beyond age 50 (see, e.g., Brown and Lin, 2012). Thus, a sharp cut-off point is used for defining the research area of grey divorce. The application of such a fixed cut-off age can result in biased results when the age at marriage and the age at divorce differ across countries or social groups. For example, there are consistent gender differences in life course patterns, with men experiencing family transitions, such as marriage and divorce, at later ages than women. Thus, using a fixed cut-off point for both genders in defining grey divorce does not adequately account for these differences. Likewise, as we have seen a postponement of major life events across cohorts, it is possible that the greying of divorce is simply part of a larger shift in life course patterns. In the same vein, as life expectancy has increased and the image of what constitutes old age has shifted, the practice of using a fixed cut-off point for defining grey divorce may be called into question.

Finally, most research on separation at older ages has focused on divorce, as implied by the term "grey divorce". The term "grey divorce", however, does not explicitly cover separations of non-marital unions.[3] While past research has often viewed cohabitation as a family

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arrangement restricted to early adulthood, family diversity is increasing in later life. This raises several social policy concerns, such as that of how the "weaker party" in a non-marital union can be shielded from the adverse consequences of a breakdown of the union later in life (Sánchez Gassen and Perelli-Harris, 2015). Thus, future research on this topic should be extended to cover separations of non-marital unions at advanced ages.

ACKNOWLEDGEMENT

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NOTES

1. The widow's pension was abolished in Sweden in 1990, but was replaced by the survivor's pension (Swedish Pensions Agency, 2022). This pension is, however, regarded as an adjustment pension, and is usually paid for only 12 months after the partner's death.
2. See, e.g., the database of the Commission on European Family Law: http://ceflonline.net/country-reports-by-jurisdiction/.
3. In response to this limitation, some scholars have tried to establish the more general term of "silver splits" (e.g., Alderotti et al., 2022). There seems to be some confusion, however, as other scholars have employed "silver separations" to refer to divorce at even more advanced ages, such as 70 and older (Kirby and Leopardi, 2016: 3).

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PART IV

CORRELATES AND CONSEQUENCES OF PARTNERSHIPS

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16. Parental influences on partner relationships

Aart C. Liefbroer

Parental influences on partner relationships are pervasive. This is mainly for three interrelated reasons. First, children are born into (single- or multi-parent) families, making parental relationships among the longest-lasting relationships in which individuals participate. Parents constitute a "convoy" that "travels" with individuals throughout their life course (Kahn and Antonucci, 1980). Second, as children are born into families, parents are responsible for caring for children during childhood and adolescence, periods that are most important for the future life chances and outlook of individuals (Vollebergh et al., 2001; Pöge, 2020). Third, parental influence is multidimensional, encompassing normative, behavioural, enabling and genetic influences (Grusec, 2011). Although the relative weight of these influences varies over time, parental influence remains important throughout children's own life course.

Although the arguments for parental influences on partner relationships are strong, the empirical evidence is more limited. This is mainly due to the difficulty of observing the processes involved, especially because the intergenerational transmission of partnership-related behaviour spans two generations and multiple decades. Studies based on register or survey data show that partnership characteristics such as the number of partners (Kamp Dush et al., 2018), marriage timing (Arocho and Kamp Dush, 2017), the number of union dissolutions during young adulthood (Amato and Patterson, 2017), and the risk of divorce (Feldhaus and Heintz-Martin, 2015) are transmitted from parents to children, but also that the family trajectories of parents and children resemble each other more than those of non-relatives (Fasang and Raab, 2014; Liefbroer and Elzinga, 2012).

How do processes of parental influence operate? Figure 16.1 provides a schematic overview. I distinguish four main sets of characteristics by which parents influence their children's partner relationships: expectations, behaviours, resources and genes. These characteristics do not influence children's relationships directly, but indirectly as they shape their children's preferences regarding partner relationships, the resources they have available to initiate and maintain partner relationships, and the opportunity structures they encounter that facilitate or hinder the initiation and maintenance of partner relationships. Jointly, preferences, resources and opportunity structures shape the partner relationship history of individuals.

Finally, when thinking about partner relationships, I distinguish four aspects: temporality, selection, structure, and functioning. Temporality includes issues relating to the occurrence, timing and sequencing of relationships, such as at what age they are initiated and ended. Selection or partner choice refers to the characteristics of the partner. Structure relates to the living arrangements of partners: whether they live together, are married or not, and who else lives in the household. Functioning refers to what goes on in relationships, such as the division of labour, interaction patterns and parenthood choices.

The chapter is structured according to the processes by which parents influence children's partner relationships. I first discuss how parents influence the preferences of their children concerning partner relationships and how these preferences in turn influence children's partnership choices. Next, I turn attention to the resources children have available to manage

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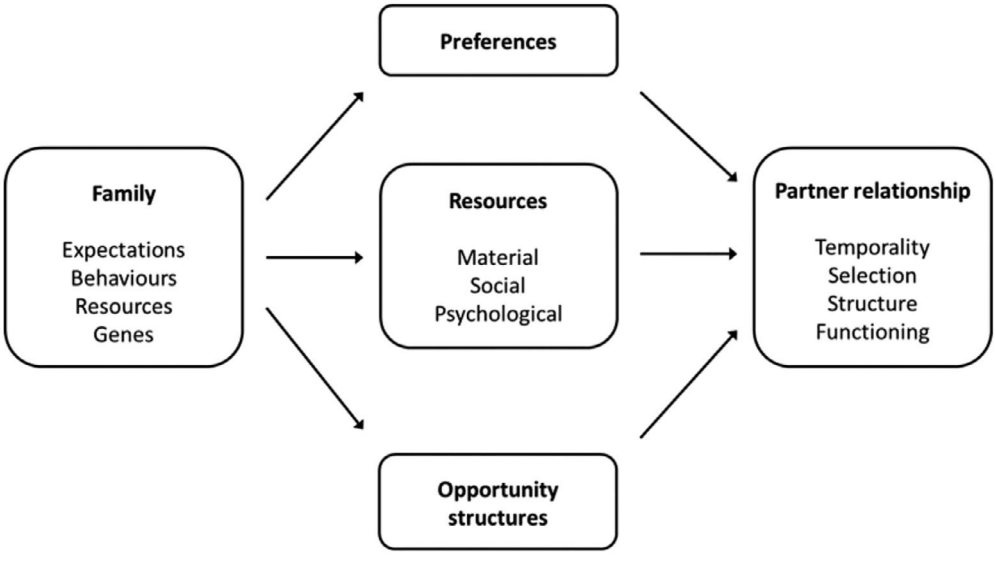


Figure 16.1 A schematic model of parental influences on partner relationships

partner relationships, and finally how parental influences on children's opportunity structures play a role. Next, I pay attention to the type of parental family children grow up in. As an increasing proportion of children spend part or all of their childhood without both biological parents being present in the household, it is important to examine whether the processes outlined in Figure 16.1 operate in the same way in different types of family arrangements. In addition, I will discuss whether the strength of intergenerational transmission processes vary by time and place.

16.1 PREFERENCES

Partnership decisions are influenced by the preferences individuals hold concerning these relationships (Bernhardt et al., 2016; Arocho, 2019). Usually, childhood and adolescence are viewed as the main formative periods of values and attitudes (Rekker et al., 2019; Pöge, 2020). Given that children usually live with one or both of their biological parents during this period, parents can be expected to exert a strong influence on the formation of partnership preferences. This influence usually results from two partially independent processes: value socialization and (role) modelling (Keijer et al., 2018).

In value socialization, parents try to actively transmit their views on partner relationships to their children. For instance, if parents are in favour of marriage and opposed to unmarried cohabitation, they might actively discuss the issue with their child during adolescence or may make more cursory comments on these issues when discussing behaviour of others or commenting on social media information. It is very hard to directly observe these kinds of conversations. Usually, value socialization is deduced from the correlation between the values and attitudes of parents and those of their children (e.g. Axinn and Thornton, 1993; Cunningham, 2001). The stronger this correlation, the more this is assumed to reflect value socialization.

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Role modelling is usually viewed as a less conscious and active process of transmission of preferences (Starrels and Holm, 2000). The preferences of children are thought to be influenced by their observation of parental behaviours. Parents are usually the first adults whose behaviour is observed by children. As they will have few alternative sources of information on what is possible or usual in partner relationships, they may take the ways parents interact for granted and develop preferences for the same kind of behaviours. Clearly this need not always be the case, as children may feel that some parental behaviours, for example conflictual or abusive interaction patterns, are not what they prefer. In those instances, their preferences may develop in another direction. However, as we will discuss later, it could still be that they develop social interaction skills that emulate their parents' behaviour as they have not been able to observe and learn other types of interactional behaviour. Just as with intergenerational transmission of preferences, it is also difficult to directly observe role modelling of partner relationships, as the period in life when children put these into practice is often far removed from when they observed these patterns among their parents.

Keijer et al. (2018) found evidence for both intergenerational transmission of preferences and modelling in a Dutch study on adolescents' preferences concerning the timing of cohabitation and marriage. However, the effects of parental preferences and actual timing were somewhat stronger for the timing of first marriage than for the timing of first cohabitation. Platt and Polavieja (2016) showed that among British adolescents, attitudes towards the sexual gender division of labour depend both on what parents "say" and "do", also confirming the importance of the processes of value socialization and role modelling. In focus group discussions, cohabiting young adults identified experiencing parental divorce as an important trigger for their own scepticism about marriage (Perelli-Harris et al., 2017). In another qualitative study among US undergraduates, Allison (2016) found that dating behaviours were influenced both by direct, verbal messages and by examples that family members set, again suggesting the importance of both socialization and role modelling. Ivanova et al. (2011) found that Dutch adolescents with divorced parents were more likely to date only if their parents had recently divorced. This suggests that these children react to the heightened stress that parental divorce produces, and that parental influence is not restricted to value socialization and role modelling.

16.2 RESOURCES

Partnership behaviours are not just influenced by preferences, but also by the resources that individuals bring to the relationship. Resources are "entities that either are centrally valued in their own right […] or act as a means to obtain centrally valued ends" (Hobfoll, 2002). Multiple types of resources are important in this respect. Material resources, such as income, wealth and home ownership, are important in both the initiation and maintenance of partner relationships, as sufficient material resources are often viewed as a prerequisite for starting a partner relationship (particularly marriage) (Blossfeld and Huinink, 1991), and a lack of resources is assumed to cause stress that can negatively influence interaction patterns and increase the risk of union dissolution (Amato and Patterson, 2017). Social resources include different types of support such as informational and emotional support, as well as the skill set that facilitates individuals to initiate and maintain relationships. In addition, psychological resources, such as levels of neuroticism, extraversion and sensation seeking are important as they can also influence the initiation (e.g. extraversion facilitating finding a partner), mainte-

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nance (e.g. neuroticism straining the quality of partner communication and interaction) and dissolution (e.g. sensation seeking leading partners to explore alternative relationships) of partner relationships (Solomon and Jackson, 2014; Sodermans et al., 2017; Lee et al., 2020).

As in the case of preferences, many of these resources are influenced by parents during childhood and adolescence. Available material resources can be divided into personal material resources of the child and transferred material resources (De Jong Gierveld et al., 1991). Personal material resources are clearly influenced by the level of educational attainment, which is strongly dependent on parents' socio-economic status (Mastekaasa and Birkelund, 2023), but also on genetic factors (Erola et al., 2022; Verweij and Keizer, 2022). Transferred material resources are resources that parents put at the disposal of their children to shape their partner relationships. This again, depends on the parents' income and wealth, with wealthier parents being better able to support their children with acquiring relevant partnership commodities, like paying for the wedding, loaning money for appropriate housing (Mulder et al., 2015), or providing for a return to the parental home in the event of a union dissolution. Wiik (2009) observed that Norwegian young adults from privileged economic backgrounds were more likely to postpone marriage, which could be due to the sanctioning power of wealthier parents. This suggests more generally that parental support may come at the price of acting against one's preferences (Liefbroer and Billari, 2010), for example when parents are willing to co-finance a mortgage only if their child marries, whereas the child would prefer unmarried cohabitation.

Next to material resources, emotional and instrumental resources may also matter. Min et al. (2022) examined support exchanges around marriage, parenthood and divorce in Germany. They found clear associations between these partnership events and support. For instance, if children divorced, both emotional and material support from parents increased. As these examples make clear, family influences are not limited to childhood and adolescence, but often continue far into children's adulthood, with parents being of key importance for the provision of all kinds of social support. Kalmijn (2019) showed that in the Netherlands the flow of support is mainly "downwards" (from parents to children) until around age 75.

Social skills are another important set of resources that are shaped by parental behaviours. Observing interaction patterns between parents can shape the relational skills of their children, as they internalize behavioural patterns that they take for granted (Heinze et al., 2020). Conger et al. (2000) observed that in the USA nurturant-involved parenting was positively related to warm and supportive behaviours of children towards romantic partners, which in turn was positively related to relationship satisfaction. Finally, psychological resources can be influenced by parents. Here, genetic inheritance patterns are the most important factor, as it is well known that personality is strongly genetically based (Vukasovic and Bratko, 2015). In addition, the link between personality and marriage has also been found to be heritable (Johnson et al., 2004). At the same time, genetics often play out in interaction with the environment (Spotts et al., 2005; Baier and Van Winkle, 2021), suggesting the importance of studying how genes interact with internalization processes in the parental home.

16.3 OPPORTUNITY STRUCTURES

A third way parents can influence the partner relationships of their children is via opportunity structures. Opportunity structures is a "catch-all" concept, including all kinds of factors

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outside the child and his or her parents that either facilitate or constrain the opportunity of children to act in line with their preferences and/or resources. Macro-level societal conditions that impinge on children's family life, such as the availability of affordable housing or macro-economic circumstances are outside parents' scope of influence. However, other, micro-level aspects of the opportunity structure are within this scope. Neighbourhoods in which children grow up are shared with their parents and strongly influence their family lives (Buyukkececi, 2023). For instance, parents can influence the social networks in which their children mingle, facilitating meeting particular potential partners (Kalmijn and Flap, 2001). Parents' social network resources can also introduce their children to educational or employment networks that can facilitate finding a suitable spouse.

16.4 UNDERSTANDING DIVERSITY

The model presented in Figure 16.1 provides a general framework to understand how parents influence the family experiences of their children. It also helps to reflect upon factors that might influence the strength of the intergenerational transmission of family behaviours. Below, I will pay attention to the extent to which the type of family structure in which children have grown up might influence the strength of the relationships depicted in Figure 16.1. In addition, I will discuss differences in the strength of parental influence across countries.

16.4.1 Family Structure

Most research on parental influences on partnership behaviour examines growing up in families in which both biological parents are present. First, growing up with both biological parents has been the most common situation for children in Western societies during much of the twentieth century. However, with the increase in union dissolution, situations in which a child does not live with both biological parents for prolonged parts of childhood have increased. Second, most general surveys have not collected detailed information on childhood living arrangements and often lack information on one of the parents (usually the father), especially if both biological parents are not living together. Fortunately, the number of studies specifically targeted at children from families without both biological parents, and that allow comparison of processes between different types of family arrangements is increasing (Kalmijn et al., 2018; Lee and McLanahan, 2015). Still, research on parental influences has lagged behind the trend towards diversity in family arrangements.

Research comparing children in diverse family settings suggests that the intergenerational transmission of attitudes may be weaker in families without both biological parents than in families with both biological parents. For instance, Van der Valk et al. (2008) showed that, in the Netherlands, intergenerational transmission of the tolerance of non-traditional family forms was stronger in non-divorced than in divorced families. Cunningham and Thornton (2006) find evidence that, on average, in the USA intergenerational transmission of attitudes towards marriage and its alternatives is positively associated with the parents' marital quality. A Dutch study by Kalmijn (2021) suggests that both value socialization and role modelling remain important in stepfamilies.

The material resources that parents bestow on their children and that are important for partner relationships are usually more restricted if children grow up part of their time in

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families without both biological parents. This is true for financial and educational resources (Bussemakers and Kraaykamp, 2020), although stepfathers could also partially replace the biological father if children have little contact with the latter (De Leeuw and Kalmijn, 2020). But it also applies to other types of resources. Lee and McLanahan (2015) show that moving out of a "stable" family increases both externalizing and internalizing problems among US adolescents, thus reducing the emotional resources available to these children. Bastaits et al. (2012) show that fathers' support and control was weaker among Flemish non-residential fathers than among married or joint-custodial fathers, but that fathers' support was beneficial for children's self-esteem in all family constellations. Social resources are also transmitted more weakly in families without both biological parents, as the likelihood that children will get poor examples of how to interact in intimate relationships is higher. For instance, Sassler et al. (2009) report that children from families without both biological parents in the US report lower satisfaction within dating relationships than children from families with both biological parents present.

All examples above focus on heterosexual families; however, in recent decades, the number of children growing up in LGBTQ families is also increasing. Little is known about the strength of parental influences in these families. However, data from the US National Longitudinal Lesbian Family Study suggest that the adaptive functioning of children from lesbian families regarding family and partner does not differ from a control group (Gartrell et al., 2018). But this kind of research is still in its infancy. Again, the model presented in Figure 16.1 could be helpful to reflect on potential differences in the strength of some of the suggested mechanisms between children who have grown up in heterosexual couples and children who have grown up in LGBTQ families.

16.4.2 Family Influences in Comparative Perspective

Most of the research on family influences is limited to a specific time or place; however, the strength of intergenerational transmission processes may vary across time or space. Figure 16.1 helps to understand how cultural, economic or institutional factors could impact the strength of the mechanisms involved.

Since the 1970s, growing individualization in Western societies may have altered the link between parental background and children's preferences. As proposed by the Second Demographic Transition (SDT) thesis (Lesthaeghe, 2014; Van de Kaa, 1987), the level of normative control over individual values and attitudes has declined over time. What the shift in values implies for socialization regarding partner relationships is not quite clear, though. On the one hand, the strength of value socialization may weaken as the SDT progresses, as norms become less important and children may be less inclined to take parental norms about partnering for granted. It could also be that parents themselves become reluctant to impose their ideas on their children, and emphasize that their children should chart their own way through life. Beaujouan and Solaz's (2019) finding that the association between family sizes of parents and children has decreased over the last century in France aligns with this explanation. On the other hand, the strength of value socialization may have increased as the loosening of normative constraints and the increase in individualization turn parents into a main source of information for children to orient themselves towards. This latter idea of an increase in the strength of value socialization has also been suggested by proponents of the role of genes in intergenerational transmission processes. In times of strong normative constraints, people are

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thought to have little leeway in deciding how to behave in partner relationships. However, if normative control wanes, "individual" factors, including genes, may become more prominent, strengthening intergenerational transmission processes (Kohler et al., 2002). However, Van Winkle and Conley (2021) found no evidence in the US that the heritability of the complexity of partnership trajectories changed across cohorts.

The link between parental background and children's resources is sometimes thought to be weaker in times and places in which economic conditions are better, welfare states are stronger and norms are weaker. This "contexts of opportunity" hypothesis (Liefbroer and Zoutewelle-Terovan, 2021) was tested with mixed results. Mooyaart et al. (2022), using GGS data on France, Italy, Romania and Sweden, found that family formation pathways continue to be stratified by parental socio-economic background, with relatively little change over time. Brons et al. (2017), using ESS data, show that the link between parental socio-economic background and union formation timing varies across Europe and is weakest in Northern and Western European countries, probably because the intergenerational transmission of educational opportunities is weaker in those countries than in Southern and Eastern Europe. Also in line with the contexts of opportunity hypothesis, Koops et al. (2021), using GGS data and additional harmonized data on 19 countries, found that parental socio-economic background has a stronger association with having a child in an unmarried cohabitation in countries with more traditional family formation norms.

16.5 CONCLUSION

This chapter discussed the way in which parents influence the partnering behaviour of their children. The key mechanisms linking both are that parents' attitudes, behaviours, resources and genes could influence the preferences and resources of their children and the opportunity structures in which these children are located. In turn, children's preferences, resources and opportunity structures influence the partner relationship choices they make, in terms of the occurrence and timing of partnership transitions, the type of partnerships entered, and the way partners structure their relationship. The key focus was on studies that elucidate the general processes involved and how these vary between different family structures in which children are raised and how they differ by country context. A number of other interesting issues, however, warrant attention as well.

The strength of intergenerational transmission processes not only varies by union type, time and place, but could also vary by other dimensions. Migrant background is a particularly interesting dimension in this regard. For instance, Huschek et al. (2012) show that, across a range of European cities, family-initiated partner relationships are most common among first-generation young adults with a Turkish migrant background, followed by second-generation young adults with a Turkish migrant background and non-migrants, suggesting that family influence on partner selection may depend both on migrant background and whether those with a migrant background are born in the receiving country or not. Other relevant dimensions are whether mothers and fathers are equally important in the intergenerational transmission of partner relationship characteristics and whether sons and daughters are equally strongly influenced. Keijer et al. (2018) do not observe differences in the strength of the value socialization and role modelling relationships that they study, either between fathers and mothers or between boys and girls. Savelieva et al. (2017), in studying the intergenerational transmission of feelings of

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acceptance and warmth in parent–child relationships, report that the transmission of warmth is stronger for sons than for daughters.

Finally, this chapter focuses on parental influence on their offspring's partner relationships. It is important to note, though, that the relationship could also be reciprocal. Children could also influence the partner relationships of their parents. For instance, having children at home influences parents' chances of repartnering, albeit differently for men and women (Goldscheider and Sassler, 2006). This could be due to parents being a less attractive partner if children still live at home, but also by children influencing their parents' preferences towards repartnering (De Jong Gierveld and Merz, 2013).

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17. Health and partnerships

Gerald R. Nowak III and Hui Liu

In recent decades, family scholars have found marriage to be positively associated with a wealth of mental and physical health advantages, particularly when married people are compared to their unmarried counterparts (Hughes and Waite, 2009; Liu and Waite, 2014; Robles et al., 2014; Simon, 2002; Waite and Gallagher, 2001). Other studies suggest that certain health benefits, such as self-rated health, are also associated with cohabitation, albeit to a lesser extent (Perelli-Harris et al., 2018). On the other hand, marital dissolution, which is widespread in European nations (Eurostat, 2017) and the United States (Reynolds and Profile, 2020), has been linked to a variety of negative health outcomes (Lund et al., 2006). With increased public and legal recognition of same-sex marriage in the last few decades (e.g., Obergfell v. Hodges in the United States), recent scholarship has focused on the differences in health outcomes when comparing same-sex married couples against their heterosexual counterparts (Liu et al., 2020a). Further obfuscating research around health and partnerships has been the Covid-19 pandemic, which has created unprecedented circumstances whose impact is not yet fully understood. In this chapter, we provide an overview of the association between different types of partnerships, partnership dissolution, and health outcomes, providing additional context including from the Covid-19 pandemic.

17.1 THE LONG-DOCUMENTED ASSOCIATION BETWEEN MARRIAGE AND HEALTH

Hundreds of studies have indicated that married individuals have better physical and mental health outcomes compared to other unmarried groups (e.g., divorcees, singles) (see Carr et al., 2014; Carr and Springer, 2010; Hughes and Waite, 2009; Kravdal et al., 2022; Liu and Umberson, 2008; Liu and Waite, 2014; Waite and Gallagher, 2001), although recent studies have concluded that some unmarried groups (e.g., never married individuals) have narrowed this disparity in recent decades (Liu and Umberson, 2008). The health benefits pertain to a variety of outcomes; for example, married people live longer (Kravdal et al., 2012; 2018; Manzoli et al., 2007), are less prone to strokes and heart attacks (Wong et al., 2018), experience improved cardiovascular health and superior prognoses after a heart attack (Coyne et al., 2001), experience lower rates of depression (Yan et al., 2011), are more likely to detect cancers at an early stage and seek lifesaving treatment (Chang and Barker, 2005; Goodwin et al., 1987; Reyes et al., 2007) and recover from invasive surgery (Idler et al., 2012). Moreover, research has shown married persons have higher levels of subjective well-being than their unmarried counterparts (Mikucka, 2016; Waite and Gallagher, 2001), although these effects may be an artefact of selection (Perelli-Harris et al., 2018).

Some scholars surmise that the positive association between marital status and health is attributed to the accrued resources through marriage, often known as the *marital resource model* (Waite and Gallagher, 2001). According to this theory, the emotional (Umberson et

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al., 2010), financial (Waite and Gallagher, 2001), and ecological resources (Umberson and Montez, 2010) of marriage act as a protective buffer against detrimental health outcomes (Jia and Lubetkin, 2020). Studies have found that the combination of marital assets can bolster healthcare access (Becker, 1981; Killewald, 2013; Waite and Gallagher, 2001). Moreover, marriage may bolster social integration due to improving the ability to obtain social support (Liu and Umberson, 2008; Umberson and Montez, 2010). Researchers have further advanced the theory that better health within a marriage may be tied to the coaching and/or monitoring by one's spouse with respect to health behaviors (Duncan et al., 2006; Fleming et al., 2010). In other words, a spouse may be less likely to engage in high-risk activities such as excessive drinking due to the social regulation provided by their partner.

In contrast, other investigations have also shown that the health benefits associated with marriage may be, at least partially, due to selection effects. Individuals who have better physical and/or mental health may be more likely to enter into marriage and remained married (see Kalmijn, 2017; Lipowicz, 2014). In addition, the relationship between marriage and health seems to be conditioned by marital quality (Umberson et al., 2006; Robles et al., 2014) and marital duration (Zhu and Gu, 2010). For instance, marriage participants with a close bond may mutually reinforce the practice of certain healthy behaviors such as good sleep habits (see Troxel et al., 2007), and longer marriages are correlated with decreased mortality (Zhu and Gu, 2010).

Despite these established trends, recent studies have called into question whether marriage truly provides greater benefits. For instance, Kalmijn (2017) found evidence that marital dissolution was linked to increased depression and decreased life satisfaction in the short term, but found little evidence for health benefits associated with entry into marriage. Musick and Bumpass (2012) found that participants who selected into marriage often experienced similar health outcomes to cohabitors, particularly when union dissolution was not considered. Perelli-Harris and Styrc (2018) demonstrated that accounting for circumstances during childhood (e.g., mental health during teenage years, family economic status) largely mitigated any health differences between married individuals and cohabitors. Taken together, these studies challenge the scholarly narrative that *marriage* equates to *health benefits* and emphasize that the association between marriage and health may instead be due to factors which select people into marriage.

17.2 COHABITATION AND HEALTH

Scholars' recent interest in cohabitation and health benefits is warranted due to the similarities between cohabitation and marriage, as cohabiting couples are increasingly likely to raise children together (Perelli-Harris and Gassen, 2012), and stay together longer without getting married (Wiik and Dommermuth, 2011). However, there are also demonstrable differences between marriage and cohabitation as well. Perelli-Harris and colleagues (2018), in their review of literature on this topic, noted that researchers have shown that marriage and cohabitation differ in meaningful ways. For instance, looking at the matter globally, cohabitors are more likely than their married counterparts to separate (Galezewska, 2016) and report lower levels of relationship quality (Wiik et al., 2012).

When considering how cohabitors differ from married couples in the domain of health, there have been a number of noteworthy findings. For example, Liu and Reczek (2012) found that

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White cohabitors had higher levels of mortality than their married counterparts in the United States. Musick and Bumpass (2012) established that cohabitors on average self-report worse health than those who are married. The authors attributed this discrepancy to the likelihood that cohabitors were more likely to experience union uncertainty as time wore on. Finally, Kravdal and Wörn (2023), in a study of Norwegian health register data from 2006 to 2019, found that both cohabitation and marriage offered advantages to participants' mental wellbeing that were comparable.

17.3 DIVORCE, WIDOWHOOD, AND HEALTH

Earlier in this chapter, we discussed empirical contributions that relate to selection effects wherein healthy individuals are more likely to get and stay married. Related to this, studies also find that less healthy people may be more likely to have their relationship end (e.g., through separation, widowhood, or divorce) compared to individuals with more robust health (Martikainen et al., 2005). Notwithstanding selection into marital dissolution, the processes of divorce and widowhood have been shown to lead to detrimental health outcomes.

With respect to divorce, the broad consensus is that divorce is linked to poorer health and greater mortality. In a meta-analysis of 32 separate studies, Sbarra and colleagues (2011) concluded that divorced individuals lived shorter lives when compared to those who remained in their marriages. The pervasive link between divorce and increased mortality was also demonstrated by Shor and colleagues (2012) in their meta-analysis of 104 peer-reviewed articles on the topic, which spanned 24 countries.

Aside from mortality, divorce has been linked to a higher likelihood of both physical and mental health issues in later stages of the life course (Hughes and Waite, 2009; Williams and Umberson, 2004) as well as a greater likelihood that divorcees will seek psychiatric care (Björkenstam et al., 2013). Older adults in the United States and Sweden have a higher dementia risk after divorce compared to their married counterparts (Liu et al., 2020b; Sundström et al., 2016; Zhang et al., 2021). Moreover, divorce exacerbates the symptoms of persons already battling a chronic illness (Floud et al., 2014).

Widowhood, which disproportionately affects older adults (Ghesquiere et al., 2013), has also been shown to influence health outcomes negatively. Similar to divorce, the experience of the death of a marital partner increases the risk of mortality (Moon et al., 2011; Shor et al., 2012), disability (Van den Brink et al., 2004) and dementia (Sommerlad et al., 2018; Zhang et al., 2021) among older adults. Further, widowhood significantly increases the likelihood of anxiety and depression (Blanner Kristiansen et al., 2019; Steel et al., 2014).

The death of a spouse may lead to poor health outcomes for two reasons. According to Williams (2004), widows and widowers are less likely to receive health reminders (e.g., cues to take medication on time) and have a greater risk of engaging in negative health behaviors (e.g., smoking cigarettes, sedentariness). Widowhood also results in the loss of the fiscal and sociopsychological resources associated with marriage (Carr and Bodnar-Deren, 2009).

Note that the societal and familial circumstances that pertain to partnerships and partnership dissolution may differ across countries. For instance, Grundy et al. (2019) found that in Eastern, but not Western Europe, children may be a source of social support in the aftermath of a spousal death, which may mitigate the negative impacts of widowhood.

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17.4 GENDERED DIFFERENCES

When examining gender differences in health associations with marital and cohabiting partnerships, findings have been mixed. Some studies found no gender differential in these associations. For example, Manzoli and collaborators (2007) performed a meta-analysis of 53 studies that were conducted from 1995 until 2005, finding no significant gender differences in marital links to mortality. On the other hand, other studies found that men receive greater health benefits compared to their married female counterparts (Patten et al., 2006; Umberson, 1992). Moreover, Liu and Waite (2014) established that the relationship between marital quality and cardiovascular risk is more pronounced for married women than for married men.

Studies about gender differences in health links to divorce have also garnered mixed results. The most recent investigation has shown that when a marriage dissolves via divorce, it is men who experience the greater likelihood of increased mortality (Berntsen and Kravdal, 2012; Shor et al., 2012), view themselves as less healthy (Williams and Umberson, 2004), and experience more substantial declines in their subjective well-being (Leopold, 2018) than do women. Other scholarship on this topic suggests that women may be more likely to experience depressive symptoms after a divorce (Simon and Marcussen, 1999; Simon, 2002). Moreover, some inquiry into divorce-related health disparities between men and women suggested no significant difference (Strohschein et al., 2005).

Evidence about gender differences in widowhood effects tends to be more consistent, suggesting that widowhood adversely impacts the health of men more than women. When looking at the cumulative findings of 15 cohort studies, Moon and colleagues (2011) established that the relationship between widowhood and heightened mortality risk is only true for men. Stroebe and colleagues (2001) posited a variety of explanatory mechanisms for this disparity. For instance, it has been noted that women may be more resilient in the face of spousal loss, as they tend to seek support from friends and loved ones, whereas men are more likely to avoid confronting feelings of grief. Further, the authors noted that in midst of their bereavement process, women may be more likely than their male counterparts to implement a variety of strategies in their attempts to cope. However, notwithstanding the broad consensus that widowers suffer worse health outcomes after losing a marital partner, a small number of studies have documented that widows may disproportionately suffer from cardiovascular issues (Dupre et al., 2015).

17.5 SAME-SEX PARTNERSHIPS AND HEALTH

In line with the increase in legal recognition of same-sex partnerships across Europe and the US (see Van Acker et al., Chapter 8), researchers have begun to investigate the implications of same-sex marriage and union dissolution on a range of health outcomes. For example, same-sex cohabiting couples in the United States were shown to have worse self-rated physical health compared to heterosexual married partners (Liu et al., 2013), but on average they experienced equal and sometimes better physical health outcomes (e.g., quitting smoking) than heterosexual cohabitors (Liu, et al., 2013; Reczek et al., 2014a; 2014b).

However, in certain instances when same-sex partners have been shown to have worse health outcomes when compared with their heterosexual counterparts, some scholars have invoked the *minority stress theory* (Meyer, 2003) to explain extant health disparities between same-sex

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couples and different-sex couples. According to the minority stress theory, sexual minorities have historically endured various forms of discrimination which in turn may increase stress and thus contribute to a greater risk of health issues (Hatzenbuehler, 2009). Further, minority stress may also inhibit same-sex couples from experiencing the same advantages that have traditionally been enjoyed in marriage for straight couples (Meyer, 1995).

In terms of mental health, some studies suggest that same-sex cohabiting couples have worse self-reported mental health outcomes than their heterosexual counterparts (Liu et al. (2020a). When considering mortality, across two separate studies from Cochran and Mays (2011; 2015), it was shown that gay couples once endured a higher mortality risk due to the HIV epidemic than men who partnered with women. However, in the aftermath of the heightened mortality risk associated with HIV, early death among gay men has become less prevalent.

Recent studies have delved into the outcome of later life cognitive impairment related to same-sex partnerships, and the findings have been mixed. For example, Brown and Patterson (2020), Nelson and Andel (2020), and Perales-Puchalt and colleagues (2019) did not find significant differences in the likelihood of cognitive decline or dementia between same-sex and different-sex union participants. Alternatively, in an analysis of older adults who participated in the Health and Retirement Study, Liu et al. (2021) reported the odds of cognitive impairment among same-sex union participants to be significantly higher than their heterosexual union participant counterparts.

Despite research indicating health disparities between different-sex and same-sex couples, some scholars have linked the expanding public acceptance of same-sex partnerships to positive health outcomes. For instance, Boertien and Vignoli (2019) examined data from nearly half a million individuals between 2011 and 2016, following the extension of marital protections to same-sex partners in England and Wales. Their study revealed that subjective well-being improved for same-sex couples after 2014, the year when marital protections were established in these regions. These improvements in emotional well-being were observed among both married same-sex couples and cohabiting couples. The authors attribute these changes to a reduction in public stigmatization surrounding same-sex unions.

17.6 THE INFLUENCE OF THE COVID-19 PANDEMIC ON PARTNERSHIPS AND HEALTH

The impact of the Covid-19 pandemic on the health of couples, both married and cohabiting, is of interest to family scholars. Though studies that investigate whether the pandemic has altered established associations between partnership and health are still emerging, there is indication that marriage may have provided needed social support during the early months of the pandemic, particularly when looking at mental health. For instance, some studies suggest that partnerships (e.g., marriage) may have prevented participants from experiencing feelings of isolation during this period or experiencing mental distress due to a decrease in income. (Jace and Makridis, 2021). Another study by Pieh and colleagues (2020) found that compared to those who are single, individuals in high-quality partnerships were better protected against depressive symptoms during the pandemic, while partners in low-quality relationships had greater odds of experiencing mental distress. Recent studies suggest that during the early months of the pandemic widowed and divorced individuals were more likely than married

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individuals to report feeling lonely (Liu et al., 2022), although there was no significant difference in depression during the pandemic across marital status groups (Copeland et al., 2022).

17.7 CONCLUSION

In this chapter, we have presented an overview of the empirical research that examines the relationship between partnership and health. Overall, these studies have demonstrated that marriage, cohabitation, divorce, widowhood, and same-sex partnerships are associated with a broad range of health outcomes, including mortality, health behaviors, physical and mental illness, and cognitive decline in later life. Our review has revealed a recent surge in investigation challenging the long-held notion that marriage is the primary type of partnership associated with positive health impacts. Indeed, recent studies have established that both cohabitation and same-sex partnerships have the potential to produce mental and physical health benefits comparable to those observed in marriage. Future studies should continue to explore the link between partnership and health, particularly as societal norms surrounding marriage and partnerships undergo further modification in the coming decades. As the nature and circumstances of partnerships and their impact on health continue to evolve, we encourage scholars to consider the impact of emergent global events (e.g., pandemics, economic recessions) when examining these topics.

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18. Migration, ethnic diversity, and partnerships

Nadja Milewski

In an era marked by increasing population heterogeneity due to immigration and the diversification of migrant and ethnic minority groups, this chapter looks at partnering among immigrants in European destination countries.

Population heterogeneity has resulted from ongoing immigration and differential demographic behavior among immigrants and majority populations. Non-EU citizens comprised approximately 5.3 percent (23.7 million) of the EU Member States' resident population on 1 January 2021. An additional 13.7 million individuals lived in an EU Member State but were citizens of another EU country (Eurostat, 2022). Many European residents are descendants of former immigrants or belong to ethnic or religious minorities, stemming from (former) colonial systems such as France, the UK, or the Netherlands. Migration networks and systems continue to sustain immigration from older sending countries, such as Turkey (De Haas et al., 2020), leading to different generations of immigrants coexisting within the same country. Migration scholars have long recognized the heterogeneous nature of migrant populations,[1] often termed "super diversity" (Vertovec, 2007). This chapter shows that migration and ethnic diversity contribute to partnership diversity in Europe. It summarizes empirical findings from the most prominent research, mainly from quantitative studies.

Overall, quantitative research on migrant partnerships is rather meager (Andersson, 2021; Baykara-Krumme, 2022) and fractionalized. Studies on the non-migrant majority populations build largely on the Second Demographic Transition Theory (Van de Kaa, 1987; Lesthaeghe, 2010). Newer works strive to enhance the theoretical framework in order to account more effectively for institutional and policy effects on gender roles, such as the gender revolution framework (Goldscheider et al., 2015), or the theory of conjunctural action, which emphasizes within-country variation in social and demographic change (Johnson-Hanks et al., 2011). Migrant or ethnic minority groups are not included in these theoretical developments; ethnic segregation is rather perceived as hampering social change (Esping-Andersen and Billari, 2015). Studies on migrant partnerships have predominantly been occupied with the question of whether or not immigrants' union-formation patterns resemble those of majority populations in their destinations. The majority of research on migrants' partnerships is based on the classic assimilation theory (Gordon, 1964), in which immigrant groups gradually become more similar to the host populations over generations. This approach has been criticized due to its emphasis on and reconstruction of distinctions between long-term residents and more recent arrivals (e.g., Dahinden, 2016), or the perception of "others" not per se belonging to the European resident population (Schinkel, 2019).[2]

A new strand of migration research employs different theoretical approaches which benefit the study of migrant partnerships. These newer perspectives recognize the importance of migrants' origins and destinations in understanding their development. Crul et al. (2012) proposed the comparative integration context theory in the TIES project, comparing descendants of three origin groups of migrant workers across European countries. Similar data collections followed, such as CILS4EU and EURISLAM. These works revealed divergent developments

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among migrant groups depending on their institutional contexts. Some studies on migrants' family dynamics use the dissimilation approach, referencing the non-migrant population of origin (FitzGerald, 2012). The 2000 Families study focuses on Turkish emigrants and their descendants, comparing them to stayers in Turkey, and thus disentangles effects of the migration process from cultural and institutional conditions (Güveli et al., 2016). Similarly, the MAFE project (Beauchemin, 2018) examines migrants from sub-Saharan countries in three European destinations. Transnational approaches expand the scope beyond the nation state, acknowledging that migrant families maintain a feeling of collective welfare and unity across borders (Bryceson and Vuorela, 2002; Glick, 2010).

The prevailing thematic focus draws upon frameworks of social integration and migrant assimilation (Carol and Leszczensky, 2019) centering on mixed partner choice. Other areas covered are union formation and fertility, and to a lesser extent, union dissolution (De Valk and Milewski, 2011; Kulu and González-Ferrer, 2014; Adserà and Ferrer, 2015). Further, studies have been progressively supplementing the field by examining the ideational dimension of partnerships and family dynamics. Examples include explorations into attitudes toward sexuality (Röder, 2015), marriage (De Valk and Liefbroer, 2007a; 2007b), and family planning (Milewski and Mussino, 2018). Empirical studies on new forms of partnerships only occasionally appear in research on migrants, such as on non-residential unions (Caarls and De Valk, 2017) and same-sex couples (Braack and Milewski, 2020). Most often the research focus is on immigrants from the Global South to western Europe, motivated by differences in these demographic/societal contexts (Andersson, 2021). Only few studies (Koelet and De Valk, 2014; De Valk and Medrano, 2014) look at within-EU migrants (in whom the differences between countries of origin and destination are smaller), at Eastern European countries (Puur et al., 2018), or at forced migrants (Kraus et al., 2019). In this chapter, I have organized the different thematic focuses into two major sections: union formation and partner choice.

18.1 UNION FORMATION

Two significant post-World War II family-demographic changes in Europe were postponing union formation, and decoupling sexual behavior and marriage, causing a decline in marriage. These shifts are attributed to expanded education, growing secularization, and changing attitudes toward sexuality, marriage, and gender equality (Second Demographic Transition Theory; Van de Kaa, 1987; Lesthaeghe, 2010). Attitudinal and demographic changes emerged in the Nordic countries in the 1960s and became observable across Europe with some variation (Sobotka and Toulemon, 2008). Immigrant populations in Europe originate from diverse global regions and may mirror demographic behaviors and family systems from their home countries (Inglehart, 1997). At the same time, immigration contributed to increasing religious diversity in Europe, with the Muslim faith appearing as a marker of social boundaries and differences in demographic behavior compared to Christians or non-religious majority groups (Foner and Alba, 2008).

18.1.1 Timing of Union Formation

Entry into the first union is a significant life-course event in the transition to adulthood. Comparing immigrants to non-migrant majorities often reveals how first-generation immi-

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grants form unions at a younger average age. Second-generation individuals typically enter unions later than the first generation, placing them between the later ages of non-migrants and the younger first generation (Mikolai and Kulu, 2022 (UK)). Algan et al.'s (2010) book on cultural integration systematically demonstrates this trend across various European countries, including established destinations such as Germany, France and the United Kingdom, and newer ones such as Spain and Italy. Similar patterns emerge in single-country studies: Georgiadis and Manning (2011) observe this in Pakistani and Bangladeshi immigrants in Britain, and Milewski and Hamel (2010) find similar trends among Turkish descendants in France. Lower education often associates with earlier marriage ages among migrants. Stay durations in the destination country correlate with union formation (Gabrielli et al., 2019 (Italy)). In the Netherlands, patterns in the second migrant generation are more diverse, although union formation generally starts earlier among Turkish and Moroccans (Kleinepier and de Valk, 2016). Huschek et al. (2010) study the role of receiving contexts in shaping union-formation behavior among migrant descendants, and find higher first-marriage transition rates in the Turkish second generation across multiple European countries compared to the first generation, while also observing country-specific differences.

Preferences regarding marriage and family timing differ significantly based on migrant origin, persisting not only in the first generation, but also in the second. Factors such as education, religious engagement, and intergenerational transmission of parental preferences to children contribute to variation between migrants and non-migrants (De Valk and Liefbroer, 2007b (the Netherlands); Holland and De Valk, 2013).

18.1.2 Type of Partnership

Cohabitation prevalence tends to be lower among migrant groups compared to majorities (e.g. Bernhardt et al., 2007 (Sweden); Cortina Trilla et al., 2008 (Spain); Kalter and Schroedter, 2010; Kuhnt and Krapf, 2020 (Germany)). Comparing migrant generations, empirical evidence regarding union types – cohabitation vs. marriage – largely indicates adaptation processes in subsequent generations, with higher cohabitation prevalence in the second generation. These trends apply to European and North American contexts (Adserà and Ferrer, 2015). However, among immigrant children from certain regions of origin, particularly those with Muslim traditions and patriarchal family systems, the first union is more likely to be a marriage than cohabitation. This is evident in second-generation individuals from Turkey, Morocco, and Balkan countries across several European nations (e.g., Hamel et al., 2012). In the Netherlands, diverse patterns emerge among different immigrant groups: Moroccan women enter unions relatively early, but may have brief periods of living alone before union formation; Surinamese and Antillean women follow trajectories of unmarried cohabitation and lone motherhood; non-migrant Dutch women are more likely to experience non- or premarital cohabitation (Kleinepier and de Valk, 2016). Similar patterns are reported in the UK (Mikolai and Kulu, 2022). Spain sees higher cohabitation rates among major foreign-born groups – Moroccans, Ecuadorians, Colombians, and British – compared to the majority population (Cortina Trilla et al., 2008).

The cited studies offer explanations for differences in non-marital union prevalence, pointing to socio-economic and/or cultural distinctions between immigrants and host populations. To interpret these disparities meaningfully, it is crucial to consider corresponding patterns in immigrants' countries of origin. For instance, Latin America and the Caribbean exhibit higher

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rates of unmarried cohabitation, leading to smaller differences between Latin American immigrants and non-migrant Spanish in Spain, as well as Caribbean immigrants in the UK compared to other migrant groups (Adserà and Ferrer, 2015; Mikolai and Kulu, 2022). Conversely, immigrants from countries where marriage is more or less universal, such as Turkey, maintain strong support for marriage (Voicu, 2017).

Moreover, migration policies intertwine with union dynamics and may reinforce cultural patterns. In several EU countries, marriage serves as the primary, if not sole, legal avenue for the admission of third-country nationals. Marriage simplifies family reunification if one spouse has migrated, aiding cross-border mate selection for transnational or international couples. While the second generation is not directly influenced by immigration policies, their partner's origin impacts them (e.g., Milewski and Hamel, 2010 (France)). Consequently, marriage rates remain relatively high, particularly among second-generation migrants in the EU originating from non-EU countries (e.g., Hannemann et al., 2018; Wiik, 2022 (Norway)). Qualitative studies (Bonjour and Kraler, 2016; Charsley, 2016; Aybek and Milewski, 2019) in combination with quantitative research show how spouses negotiate and organize step-wise migration and family reunions (Aybek, 2015 (Turks); Kraus, 2019 (Senegalese); Kraus et al., 2019 (refugees). Migration and changing family members' social status constantly influence partnerships through ongoing processes of constitution, negotiation, and reconstitution (Bryceson and Vuorela, 2002).

18.1.3 Interrelations in the Life Course

An examination of events that mark the transition to adulthood reveals how the first union and first marriage in some migrant groups are more strongly interrelated to other events in the life course, such as the beginning of sexual activity, compared to majorities in European destination countries. This link is particularly pronounced if immigrants originate from countries where Second Demographic Transition-related developments are less prominent. This association is seen in behavior and attitudes. For instance, immigrants from Turkey often exhibit greater reluctance towards premarital sexual relations compared to their non-migrant counterparts across Europe (Hamel et al., 2012). Similarly, more conservative sexual values are found among migrant descendants in the Netherlands (Kalmijn and Kraaykamp, 2018).

The majority of second-generation individuals with Turkish, Moroccan, or former Yugoslavian ancestry left their parental home primarily for union formation, especially women who more frequently gave (direct) marriage as their reason for leaving home than men. In contrast, their non-migrant counterparts cited education and solitary living as reasons for living independently (Hamel et al., 2012). Analyzing CILS4EU data, Kogan and Weissmann (2020) found that Muslim and Christian ethnic minority youth are more likely to oppose non-marital cohabitation, particularly among those of higher religiosity compared to those of lower or no religiosity.

18.2 PARTNER CHOICE

Partner choice is a notable marker and measure of social group closeness, or openness, and of the hierarchy within different social groups. Classic assimilation theory views intergroup marriages, or exogamy, as both a result of assimilation processes towards the majority population

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and a catalyst for further assimilation of intermarried individuals (Gordon, 1964). Household economic theories suggest individuals view potential partner contributions as commodities, aiming to maximize their benefit. Partner choice and homophily theories propose that optimal matches arise when partners share similarities, thus reducing potential conflict (Carol and Leszczensky, 2019). Status-exchange theory adds a complementary view by proposing that a partner compensates for a disadvantage in one status dimension with an advantage in another, relative to the spouse (Merton, 1941).

Despite a recent rise in numbers, mixed unions remain the exception rather than the rule across Europe (Lanzieri, 2012; Hannemann et al., 2018). This pattern holds across different destinations, migrant origin groups, and migrant generations, encompassing both marriages and non-marital cohabitations, as shown for several migrant groups in Germany (González-Ferrer, 2006), in Spain (Cortina Trilla et al., 2008), in Belgium (Hartung et al., 2011), and in the United Kingdom (Kulu and Hannemann, 2019).

18.2.1 Types and Correlates

Three main factors affect partner choice: individual preferences, opportunity structures in the marriage market, and third-party influence (Kalmijn, 1998). They are not discrete, but rather intertwined, and emphasize the significance of culture, or cultural diversity, in partner choice. Culture is a preference element, that is, we have a stronger liking for those who are similar to us (Carol, 2016). It is also an element within opportunity structures and social networks, that is, we are more likely to meet and communicate if we are alike. In terms of individual preferences, Potârcă and Mills (2015) underscored own-group dating preferences. Non-White immigrant populations generally show lower exogamy rates (Van Tubergen and Maas, 2007; Muttarak, 2010 (Britain)). Higher perceived socio-cultural similarities often correspond to increased mixed marriage rates. Religious affiliation has emerged as a novel social boundary indicator. While historical differences exist between Christian churches (Kalmijn, 1991), Muslims now stand as Europe's new "other" group, displaying notably low intermarriage rates (Lucassen and Laarman, 2009; Voas, 2009 (Britain); Carol, 2016). There are mixed findings regarding the relationship between education and exogamy, and the evidence for status exchange is inconsistent (Van Tubergen and Maas, 2007; Muttarak, 2010; Çelikaksoy, 2016). Mixed unions tend to be more common in the first migrant generation than the second (e.g., Kalmijn and Van Tubergen, 2006 (the Netherlands); Safi, 2010 (France)).

Regarding opportunity structures, higher mixed-marriage rates were generally found in smaller migrant or ethnic minority groups (González-Ferrer, 2006 (Germany); Dribe and Lundh, 2011 (Sweden)), and in less segregated migrant groups (van Tubergen and Maas, 2007 (the Netherlands); Muttarak and Heath, 2010 (Britain)). Findings on imbalanced sex ratios and heterogamy in other social traits yield mixed results (González-Ferrer et al., 2018 (Spain)). The marriage market's structure and size, however, cannot entirely account for group differences; instead, explanations often center around cultural factors, primarily religion and religiosity (e.g., Çelikaksoy et al., 2006 (Sweden); Van Tubergen and Maas, 2007; Carol, 2013; Topgül, 2016 (Switzerland)), or host-country language and contextual factors (Puur et al., 2018 (Estonia)).

There is a significant contrast in third-party influence on mate selection, in particular family involvement, between countries with prolonged individualization processes and those with familistic family structures. In the latter, marriage is less an emotional choice of two individ-

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uals and more an action involving extended families, representing intergenerational solidarity and transmission. Parents and siblings have a strong impact on a person's partner selection throughout the marriage process, and these social practices persist within migration contexts (Strassburger, 2003 (Turks in Germany)). Parental involvement has been studied in detail in Europe among immigrants from countries with a Muslim tradition (Baykara-Krumme, 2015; Van Zantvliet et al., 2014; Topgül, 2015). Compared to their country of origin, the prevalence of arranged unions declines faster among children of Turkish emigrants (Baykara-Krumme, 2017). While these unions are often termed "arrangement" marriages, the term can be misleading, as the level of third-party involvement varies. Family members may intentionally facilitate encounters between potential partners, such as during vacations or family gatherings in the home countries. Parents may actively encourage or discourage their child's partner choice (Milewski and Huschek, 2015), or they may transmit their notions of an ideal partner (De Valk and Liefbroer, 2007a; Munniksma et al., 2012; Carol, 2016).

Another characteristic linked to family influence is consanguine marriages, specifically marriages between cousins. Approximately a quarter of marriages among Turks in Europe are estimated to be inter-cousin marriages. Such marriages appear more probable in transnational scenarios than in co-ethnic unions among two members of the same immigrant group residing in the same destination country (Milewski and Hamel, 2010 (France); Baykara-Krumme, 2016 (Turks)).

Third-party influence on partner choice can also be exerted through migration and marriage policies, such as those relating to legal spouse migration eligibility or the order in which family members are permitted to arrive. Overall, quantitative empirical analyses on the impact of immigration policies remain limited. Only few surveys offer comprehensive data on admission categories or migration timing for all family members, which are essential for studying these effects (Adserà and Ferrer, 2015). Aybek (2015) examined the policy in Germany, where a spouse's reunion with the family was contingent upon passing a German language class in their country of origin prior to immigration. This requirement generated significant insecurity for potential mates and disrupted the marriage-formation process, impacting their life courses. Others highlight potential conflicts in marriage migrants (Liversage, 2012). Substantive qualitative literature demonstrates how migration policies intersect with partnership and family trajectories. As families cross international borders, they cease to be solely private institutions, and become the subject of contentious political discussion (Bonjour and Kraler, 2016; Charsley, 2016).

In the second migrant generation, a trend emerges toward transnational constellations, where individuals marry someone from their ancestors' country of origin, thus perpetuating immigration to Europe (e.g., Milewski and Hamel, 2010 (France); Haandrikman, 2014 (Sweden)). Taking the country-of-origin perspective into account, Abdul-Rida and Baykara-Krumme (2016) observed in Turkey that family networks correlated with a greater likelihood of transnational marriages to European countries.

Few recent studies have examined partner choice from the perspective of the partner who belongs to the non-migrant majority group. Competing hypotheses, particularly concerning the role of education, have emerged. Mixed marriages may be associated with greater openness to diversity (Braack and Milewski, 2019 (Germany)) and, hence, higher education. Alternatively, they may be linked to lower education, suggesting a secondary marriage market. There is still only limited evidence on this matter. Elwert (2020 (Sweden)) discovered that natives in intermarriages tended to have lower education and a larger age gap with their part-

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ners. Haandrikman (2014) noted an increase in bi-national marriages in Sweden, exhibiting distinct country-of-origin patterns for Swedish men and women. Notably, a significant portion of bi-national marriages among Swedish citizens involved second-generation migrants who married a spouse from their parents' country of origin, that is, transnational constellations.

18.2.2 Social Integration

Research on partnership consequences in migrant groups primarily focuses on the role of exogamous partner choices, considering exogamy in the context of classic assimilation theory or status-exchange theory as both a cause and a consequence of migrant adaptation processes. Despite increasing attention, little is known about the extent, internal conflict dynamics, negotiation, and social impacts of marital mixedness (Song, 2009; Rodríguez-García, 2015). The bulk of empirical studies look into the impact of exogamy on the migrant partner. More recent investigations explore both partners or the non-migrant native partner. Positive economic effects, referred to as "intermarriage premiums", include intermarried migrants in France (Meng and Meurs, 2009) and in Sweden (Dribe and Nystedt, 2015; Elwert and Tegunimataka, 2016). Mixed findings emerge for mental health, well-being, and life satisfaction of both partners, for example, in the UK (Baltas and Steptoe, 2000), elderly individuals in Europe (Milewski and Gawron, 2019), Germany (Potârcă and Bernardi, 2021; Gawron and Carol, 2023), and Denmark (Singla and Holm, 2012; Baykara-Krumme et al., 2021).

The extent to which the selectivity into mixed partnerships can be distinguished from the causal effects of partner choices and partnership dynamics on subsequent outcomes remains uncertain (e.g., Adserà and Ferrer, 2015). In terms of gender roles for example, non-migrants in mixed unions within Europe exhibit more liberal values regarding gender equality and sexual liberalization, and have more secular attitudes (Braack and Milewski, 2019). However, when actual behavior is examined, such as gendered employment patterns, a tendency towards re-traditionalization is observed. Native men in mixed unions are more likely to assume the role of the breadwinner compared to non-migrants in endogamous unions (Braack et al., 2022 (Germany)). Among second-generation Turks in Europe, transnational and co-ethnic partner choices were linked to more "traditional", or less equal, gender roles concerning the division of household tasks, in contrast to those in mixed unions with non-migrants (Huschek et al., 2011).

Further partnership dynamics and union dissolution, specifically divorce or separation, have received greater attention. Migrant unions in Europe tend to be more stable on average compared to non-migrant couples in the respective destination countries. However, there is variability in these patterns depending on the migrants' country of origin and migrant-generational status (e.g., Andersson et al., 2015 (Sweden)). Researchers have extensively studied the impact of marital exogamy on union stability, generally finding that stability is more likely in endogamous unions than in mixed marriages (overview: Adserà and Ferrer, 2015; e.g., Van den Berg and Mortelmans, 2022 (Belgium)).

18.3 CONCLUSIONS

This chapter summarizes research on partnerships in migrant populations in European destination countries, drawing on the two key theoretical themes of the Second Demographic

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Transition and migrant assimilation. It investigates whether ethnic diversity contributes to partnership diversity. The results of the literature review collectively provide evidence, as expected, for both theories. For instance, processes such as the postponement of union formation and the decoupling of events occur in migrant groups, with diminishing differences between immigrants and natives from the first to the second generation. However, notable disparities persist, particularly in the interrelation between leaving the parental home and direct marriage in certain groups. Additionally, partner choice findings imply the persistent presence of social boundaries between long-standing and newer European resident populations, as indicated by overall low exogamy rates. This suggests that neither the Second Demographic Transition nor migrant adaptation are unidirectional, uniform processes. Instead, more complex social change processes may take place, driven by interactions between migrant and majority populations, resulting in new hybrid family systems (Alba, 2005). These systems differ from those in the respective countries of origin and destination and encompass transnational elements.

Future research may investigate how migrant origin, migration processes, and migration policies influence diversity in union formation patterns. EU immigration policies impose distinct conditions for intra-EU mobility and entry on EU and non-EU citizens, potentially bolstering "traditional" marriage norms through family reunification based on marriage (Moret et al., 2021). Thus, greater scrutiny of union types is needed. It remains uncertain if marriage, non-marital unions, and non-residential unions have the same significance across ethnic groups.

Further, an intersectional approach is needed to consider gendered migrant assimilation processes. This should explore the role of education and religiosity in greater detail (Ersanilli and Charsley, 2019). Educational expansion and secularization are key drivers of modernization and demographic change. However, religiosity might evolve uniquely within certain migrant or ethnic minority groups, potentially reinforcing "traditional", gendered partnership and family trajectories. Eventually, this may provide an opportunity to link ethnic and cultural diversity to the more recent mainstream demographic theories on within-country variation (as in the theory on conjunctoral action) and policy contexts, which shape gendered patterns (as in the gender revolution framework).

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NOTES

1. The definitions of "migrant" or "ethnic group" vary between countries according to national statistical traditions, but also within countries by data source and research design. In this chapter, the terms "migrant", "emigrant", "immigrant", or "ethnic minority" refer to residential allocations across international borders; they are used as broad groupings to compare general trends among allochthonous populations, and may not correspond exactly to the definition in each cited paper.

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2. Assimilation is traditionally perceived as a one-way process, in which immigrant groups become more similar to the majority population. This contrasts in the European literature with the term "integration", which is supposed to confer a two-sided understanding of adaptation processes (Esser, 2004). In this chapter, I use the term "assimilation" rather as indicating a comparative perspective than as a normative reference category. This terminology may not necessarily coincide with the terms in the cited studies.

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19. Biopsychosocial perspectives on close relationships

Lane Beckes

Close relationships profoundly impact the human brain and body. Social isolation, loneliness, and abuse put people at substantial risk of physical and mental illness, and even death (Holt-Lunstad et al., 2010; Strathearn et al., 2020). The impact of relationship quality on mortality risk is similar to or greater than other serious behavioral health risks, such as smoking or a sedentary life-style. This well-established fact makes the integration of biological and psychological perspectives critically necessary for public health initiatives. This chapter outlines how insights from neuroscience regarding stress, motivation, and predictive processes illuminate important principles in how relationships impact health and well-being, and subsequently how those principles can be applied to close relationships and partnership transitions.

Often people think about relationships as only indirectly related to physical health. This way of conceptualizing health and relationships misses the deeper ways in which our bodies and brains are intricately sensitive to, and even dependent on interpersonal connection. Humans are at their core a social species, evolved to construct physical niches through the use of culture (Ellis, 2016). That evolutionary pathway produced adaptation to a cultural niche and strong dependence on social connection (Beckes and Coan, 2011). We see this deep connection in many features of human biology, behavior, and cognition. For example, relationships are among the most persistent and strongest causes of stress and stress relief for humans (Cohen and Wills, 1985; Saxbe et al., 2020). The quality of our social connections thus plays a critical role in determining how we adapt to challenges and experience physical wear and tear from stress. Ultimately, the process by which we adapt, called *allostasis* (Sterling, 2012), involves determining what actions will best serve our needs, usually before those needs arise, and based on the anticipated incentive or pleasure of a given outcome (Berridge, 2012). Relationships are key to those predictive processes in two ways. First, relational needs and desires are highly incentivized by our biology because of our social nature. Second, as a species we are superb at distribution and coordination of physical effort, which allows us to meet many of our physical needs via *load sharing* (Beckes and Coan, 2011). In this chapter, I argue that stress biology, neurobiological incentive systems, and predictive processes influence and are influenced by relationship processes so closely that their interplay is necessary to understand each other. I end with a discussion of how these concepts can feed our more general understanding of relationships and their transitions.

19.1 STRESS AND ADAPTATION

Stress biology likely mediates links between relationships and health. From a biological point of view, stress is a response that mobilizes resources to adapt to changing situations and needs (McEwen and Akil, 2020). Stress forms a key element in the process of adaptation that Peter

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Sterling (Sterling, 2012; Sterling and Eyer, 1988) referred to as allostasis, or stability through change. This model of physiological regulation has largely replaced more traditional set-point models of homeostasis, which posit that the body has set-points or ranges that key physiological resources must be maintained within for survival. Allostatic approaches argue that the body is more flexible than this, and that the central nervous system has evolved, in large part, to better predict such needs before an organism is in deficit. As such, allostasis is a predictive process by which our needs and desires are largely managed through prospection, not reaction.

During allostasis stress hormones play a key role (Sapolsky et al., 1986). Any event that challenges an individual will promote the release of epinephrine and norepinephrine from the medulla of the adrenal gland, mobilizing the body to take action (Lupien et al., 2009). This is followed by a slower response from the hypothalamic-pituitary-adrenal (HPA) axis releasing glucocorticoids from the cortex of the adrenal gland. This response, in part, shuts down the stress sequence through the binding of glucocorticoids with hippocampal glucocorticoid receptors (Sapolsky et al., 1986). As such, the system has evolved to turn on stress when needed, but shut it off once one adapts to the challenge that initiated the response. When working optimally, the organism experiences eustress or good stress that promotes adaptation and temporarily enhances immune function (McEwen, 1998; McEwen and Akil, 2020). Sometimes, however, the challenging circumstances can promote damaging stress responses that are often referred to as distress or bad stress.

McEwen (1998) refers to bad stress as *allostatic load*, in which the individual's ability to adapt is overloaded and inadequate. Allostatic load can be thought of as the "wear and tear" the body experiences from chronic or overwhelming stress. Allostatic load comes in four primary variants (McEwen, 1998; Saxbe et al., 2020). First, one may experience allostatic load from "*repeated hits*", or multiple stressors in short order. Although any one stressor may be easily adapted to on its own, the combined impact of repeated hits can eventually overwhelm the individual's capacity to adapt. Second, there may be a lack of adaptation. For example, most people will adapt to the noise of moving into a busy neighborhood, but some may not be able to adapt and will begin to experience chronic stress from the noisy environment. Third, recovery may be delayed or insufficient. Not being able to recover from any given stressor lends itself to longer term glucocorticoid activity, which over time begins to foster physical and mental health problems. Fourth, there can be an inadequate stress response. If the stress response is not adequate to the adaptive needs of the organism, adaptation is insufficient, promoting chronic stress.

19.2 INCENTIVES DRIVE ALLOSTATIC BEHAVIOR

Predictions of outcomes in terms of positive or negative consequences form a critical feature of how the body maintains allostasis and regulates needs and drives. Kent Berridge (2004) has argued that traditional models of homeostasis, that posit a control system with mechanisms like those in thermostats, fail to capture the role of incentive motivation in physiological regulation. Those traditional models argue that needs occur when a physical resource goes above or below some threshold, which stimulates a drive to return to baseline, and mechanisms that restore homeostasis. This type of model worked much like a heating and cooling system might do in a home, with a detector mechanism (thermometer), an effector mechanism (furnace and air conditioner), and a set point (determined by setting the desired point on a thermostat).

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Over the last few decades increasing evidence amassed that even basic motivations such as hunger are driven primarily by *incentive salience*, and *hedonic impact*, not an acute lack of overabundance of water, food, or other resource. Incentive salience refers to how much an organism wants something (Berridge, 2004; 2012; Berridge et al., 2009), or is motivated to achieve a particular outcome. Hedonic impact, alternatively, refers to the liking response to the reward of having achieved that outcome. This distinction between liking and wanting is clearly observable in the underlying neurobiology of motivation and learning.

Liking and wanting often track each other closely, but can be distinguished with sensitive experimental parameters (Berridge et al., 2009; Castro and Berridge, 2014b). In studies that successfully dissociate liking from wanting, it is clear that there are a series of hedonic hotspots in subcortical regions of the brain that are associated with liking a stimulus. Although many of these hotspots are located in close proximity to dopaminergic projections, the brain substrates most closely associated with pleasure or liking are endogenous opioids. Indeed, these hedonic hotspots are often laid out in keyboard-like fashion such that stimulation produces intense pleasure responses on one side of the region and disliking on the other. Opioids enhance liking reactions on the liking side of this "affective keyboard", and diminish or suppress disliking reactions when injected into the disliking portions. Notably, dopamine, traditionally thought of as the neural substrate of reward, appears to be only indirectly related to pleasure responses.

Wanting, alternatively, appears to be largely supported by the mesocorticolimbic dopamine system, which projects from the ventral tegmental area of the midbrain to limbic structures such as the nucleus accumbens, and then into the medial prefrontal cortex. Dopamine (DA) and its interactions with glutamate and other neurochemicals often signals incentive salience or wanting (Berridge et al., 2009; Castro and Berridge, 2014a; Richard et al., 2013). Notably, dopaminergic activity within this system also tracks learning and prediction error (Berridge, 2012), suggesting that it is primarily a learning signal, and not a motivational signal. In a typical study, however, motivational states are kept constant by putting animals in a deprivation state. For example, when researchers study food reinforcement processes, they typically ensure that subject animals are in a state of energy deprivation before testing. Thus, it is often impossible to disentangle which psychological process is more closely linked with activity in the mesocorticolimbic dopamine system. Animals in a sated state often have substantially smaller responses in this system to food reward, and previously aversive stimuli, such as food with an intensely high salt content, become desirable when in a salt deprived state, promoting mesocorticolimbic activity. Incentive salience or wanting for a particular reward is driven by both previous learning or expectations on the one hand, and physiological state or satiety on the other.

One potential implication of these findings is that both unpredictability and incentive motivation drive mesocorticolimbic activity and combine to intensify wanting. Anselme and Robinson (2013) argue that uncertainty regarding reward has an attractive quality per se. Indeed, several behavioral and neurobiological studies have concluded that reward uncertainty increases incentive motivation (Anselme et al., 2017; Fiorillo et al., 2003). This may explain why early stage romantic love is associated with more obsessive desire (Hatfield and Sprecher, 1986) and greater activity as measured by fMRI in dopamine-rich brain regions (Aron et al., 2005). Although romantic love appears to continue in many relationships after long periods of time, the obsessive element disappears after a relatively short period (Acevedo and Aron, 2009), suggesting that the unpredictable elements of early relationships intensify desire and

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motivation. Intriguingly, those with greater DA system activity early in the relationship have greater relationship satisfaction after 40 months (Xu et al., 2012).

In neuroscientific studies of social behavior, dopaminergic and opioidergic systems have been consistently implicated in social motivation and bonding along with the neuropeptides oxytocin (OT) and vasopressin (Carter et al., 2015; Cho et al., 1999; Gobrogge and Wang, 2015; Loth and Donaldson, 2021). Simultaneous OT and DA activity in the nucleus accumbens is necessary for pair bonding in animal models of social monogamy, such as prairie voles (Liu and Wang, 2003). Mu opioid blockade in the caudate and putamen also prevents pair bonding, suggesting that mu opioid activity is necessary for the formation of pair bonds (Burkett et al., 2011). Sex creates conditions in which these three neurotransmitter systems are upregulated simultaneously, creating a foundation for social bonds. The upshot of these studies is that the same mechanisms that regulate allostasis in energy, fluid, and other physiological systems, are also important in the formation and maintenance of social relationships. This is the first way in which our relationships become integrated into our allostatic processes and start to influence an individual's health. Yet, in humans particularly, there are other features that promote the dependency of allostasis on social behavior. For example, humans appear to have strong innate needs for close relationships, and the manner in which we prospectively regulate our needs and desires leads our allostatic management to be even more intimately intertwined with relationship partners and their behavior.

19.3 PROSPECTIVE COGNITION AND THE BAYESIAN BRAIN HYPOTHESIS

Understanding how humans regulate their needs and desires requires an understanding of the brain's primary function. Karl Friston (2010; Friston et al., 2017) argues that the brain has evolved to minimize free energy, which involves learning to better predict future outcomes in order to guide adaptive behavior. This free energy principle states that any self-organizing system must minimize its free energy in order to maintain equilibrium with its environment and avoid disorder and entropy. The process by which the brain does this is best described as a Bayes optimal prospective function, in which the brain uses learning to optimize its ability to anticipate the world by comparing expectations to actual outcomes. In a nutshell, it is placing bets as to what is likely to occur and updating beliefs when an error occurs. Those bets are based on what are called priors in Bayesian modeling, or estimates of the expected outcome accounting for uncertainty. An important feature of these priors is that they can impact perception of events (Hardstone et al., 2021), influencing the very manner in which we see the world. In addition to perceptual priors, priors regarding the value of certain actions and outcomes are an important part of the bets the brain creates. Friston and colleagues (2012) argue that dopamine plays a critical role by signaling the salience of action cues in the environment and the probability of outcomes due to those actions. Those action cues, which Gibson (2015) refers to as *affordances*, are what our brain prioritizes in perception. Therefore, incentive systems influence what we perceive in the environment in order to serve adaptive actions (although Friston would argue that the very act of limiting errors, or surprise, is the basis of reward). This framework was adopted in social baseline theory (Beckes and Coan, 2011; Beckes and Sbarra, 2022; Saxbe et al., 2020), and if correct, has critical implications for the manner in which relationships impact human health and well-being.

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19.4 SOCIAL BASELINE THEORY

Social baseline theory (SBT; Beckes and Coan, 2011; Beckes and Sbarra, 2022) proposes that human health and well-being depend on relationships because we are an ultra-social species. Human beings have managed to inhabit most of the terrestrial world, walk on the moon, and explore the depths of the oceans. These feats are thanks to the adaptive power of cumulative culture. Our human ancestors left the need for a specific physical ecology, adapting instead to a social or cultural ecology. This is reflected in the fact that virtually any measure of health and well-being is sensitive to the quality and accessibility of close relationship partners and social networks (Cohen, 2004; Cohen and Janicki-Deverts, 2009; Cohen and Wills, 1985; Holt-Lunstad et al., 2010). SBT argues that the human organism has evolved to expect, at baseline, "… a relatively predictable social network characterized by familiarity, joint attention, shared goals, and interdependence" (p. 977, Beckes and Coan, 2011). This concept, that humans seem to expect proximity to social resources, bears out when directly observing neural responses to threat when in the presence of a relationship partner versus when alone (Beckes et al., 2021; 2022; Brown et al., 2017; Coan et al., 2006; 2017).

Social baseline theory depends on two fundamental postulates. One is the principle of economy of action (Proffitt, 2006), which states that all organisms must consume more energy than they expend. Proffitt argues that the brain has evolved to bias decision making to take into consideration energy resources and energy efficiency. The primary manner through which this biasing occurs is through perception, which is scaled by energy resources and the affordances available to us. The other assumption is the Bayesian Brain Hypothesis, that the brain is constantly making bets about sensorimotor events and trying to minimize differences (free energy) between those bets and actual outcomes. Animals learn through *active inference* – the process of minimizing sensory and motor prediction errors – what to expect from the world and build a better set of priors from which to predict outcomes.

But why does this matter for human relationships? Relationships save energy and increase affordances. SBT argues that humans save energy from social relationships through two general processes: *risk distribution* and *load sharing*. Risk distribution refers to the fact that groups of individuals often spread out risks, such as predation, over each individual within a group. Although costly in terms of competition for resources, such as food, the benefits of congregating in numbers is a tradeoff animals carefully manage. Certain birds maintain optimal group sizes that balance available food with predation risk (Roberts, 1996). Because there are more eyes and ears to detect predators, individual birds can spend more time attending to food gathering, and less time on vigilance for predators. Load sharing, alternatively, is more pronounced in humans than many other species. Trust and interdependence allow us to coordinate our actions with others and rely on the help of others. In a very real sense, relationship partners expand our affordances and make tasks easier. Close others, as long as they are predictable and responsive, become a resource we can use when dealing with allostatic challenges.

The very nature of labor distribution in human societies allows for individuals to focus on a smaller number of tasks to maintain allostasis. In high quality close relationships, that distribution of labor and interdependence allows each individual to manage their own allostatic load more effectively and takes some burden off the partner. Thus, a predictable and reliable partner will make challenges seem less daunting and modify our perception of the risks and efforts imposed while navigating daily life. This means individuals with high quality relationship

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partners and social networks can spend less energy on vigilance and self-regulation, and will have a greater capacity to achieve allostasis.

Many neurobiologists have posited that socially induced reductions in stress and vigilance are primarily due to previous learning that activates automatic emotion regulation systems in the brain, or due to the impact of social touch on opioidergic activity (see Eisenberger et al., 2011; Nelson and Panksepp, 1998). The self-regulation hypothesis of social soothing argues that the ventromedial prefrontal cortex (vmPFC), after learning the relationship partner is a cue of safety, downregulates limbic system activity to threats, effectively overriding threat signals (Eisenberger et al., 2011; see also Urry, 2006). Yet many studies that have observed the impact of partner handholding on the neural response to shock threat and pain stimulation have not observed any increased activity in the vmPFC (Coan et al., 2006; 2017; Johnson et al., 2013; López-Solà et al., 2019) during partner handholding relative to when participants are alone or holding hands with a stranger. In a recent analysis of a large dataset, psychophysiological interaction analysis indicated a pattern of neural connectivity between the vmPFC and threat responsive brain regions opposite to the pattern expected if the vmPFC caused reductions in the threat response in response to handholding (Beckes et al., 2021). Supplementary analyses revealed a similar pattern when looking for interactions between threat responsive brain regions and reward responsive brain regions.

Similar results were found in a recent study investigating the role of opioids in the social regulation of the neural threat response (Beckes et al., 2022). The authors used an opioid antagonist, Naltrexone, to block the activity of opioid receptors during fMRI scans of participants undergoing threat of shock in the handholding paradigm. Notably, threat response was lower in the partner handholding condition in participants who received the opioid antagonist, suggesting that blocking opioid activity did not completely eliminate the palliative effects of partner handholding on the neural response to threat. Although this study cannot rule out the possibility that opioids are sufficient for the effects of social touch on threat responses, it does seem to rule out the possibility that opioids are necessary for those effects.

These studies suggest that a different process explains reduced threat responses when in contact with a relational partner. SBT argues that being in the presence of a familiar predictable other is a more natural state of being, and being alone is stress potentiating. In other words, we see the world as scarier and more threatening when we are alone. In this sense, being with familiar and predictable others is the baseline condition for most people, whereas being alone is simply more stressful.

19.5 SOCIAL ALLOSTASIS AND SOCIAL ALLOSTATIC LOAD

Thus far this discussion has focused on the role of relationships in reducing allostatic load. Despite this, the effects of relationships on stress and health can cut both ways. In relationships that are deteriorating, are abusive, or are otherwise dysfunctional, the relationship can become a major source of allostatic load on the individual, and allostatic load within the dyad can put strain on the relationship per se (Saxbe et al., 2020). This suggests that the term "social allostasis" has two meanings. First, social relationships have critical importance for the individual's ability to avoid allostatic load. Because humans are highly social, relationships are necessary for survival and thriving, and a lack of positive social connections can be an existential threat. Second, relationships, particularly partnerships and families, become like an organismal unit,

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which itself must adapt in order to prevent allostatic load and threats to its existence (Saxbe et al., 2020).

Close relationships often provide a protective factor against the perils of allostatic load, but they can also be a source of some of life's greatest stressors. The Centers for Disease Control and Prevention (CDC, 2021) recognizes a number of traumatic experiences from childhood that can have a profound impact on later health. These adverse childhood experiences (ACEs) include physical, psychological, and sexual abuse; neglect; parental separation, imprisonment, violence, divorce, and death; and having mental health issues in the household such as depression, attempted suicide, substance abuse, and other mental illnesses (Anda et al., 2006; Felitti et al., 1998). Notably, most of these ACE categories are relational in origin. Social evaluation (Kirschbaum et al., 1993), social rejection and rejection sensitivity (Berenson et al., 2009; Eisenberger et al., 2003; Gao et al., 2017), relationship conflict (Kiecolt-Glaser et al., 2005), and low-quality relationships (Holt-Lunstad et al., 2008) predict greater stress, poorer healing from injury, and poorer health generally. This type of stress, particularly over time, tends to produce reductions in flexibility and adaptability (Saxbe et al., 2020). This exacerbates factors that contribute to allostatic load such as a lack of adaptation and insufficient recovery. Therefore, the individual enters a positive feedback cycle of greater dysregulation in the system, and more wear and tear.

In addition to being a boon or drag on an individual's ability to manage stress, relationships themselves can be susceptible to allostatic load. This realization requires a shift in perspective from thinking of the individual as the unit of analysis to the dyad or group. In couples, a key to successful allostatic adaptation requires maintaining or increasing flexibility within the couple. In particular, affective rigidity appears to increase social allostatic load within partnerships (Saxbe et al., 2020). Affective rigidity and flexibility refer to an individual's ability to regulate emotion in a manner that allows for smooth transitions when new situations or conditions emerge (Hollenstein, 2015). Individuals who are affectively flexible can inhibit one emotional state in order to allow another to occur. Affective rigidity indicates difficulty with making these transitions, and is marked by the individual getting stuck in particular emotional states, often called attractor states in dynamical systems theory, more frequently and intensely. In systems theory, rigidity is often an indicator and cause of failure to adapt. Hence, this is why major couples therapy approaches, such as integrative behavioral couples therapy (Jacobson and Christensen, 1996), often try to upend rigid interaction patterns by promoting more flexibility through principles such as acceptance and change.

Social allostatic load is often reflected in higher correlations and linkages between the physiology of each partner with the other (Timmons et al., 2015), particularly when the partners are experiencing high levels of stress. For example, poor sleep efficiency and negative partner interactions have bidirectional relationships (Hasler and Troxel, 2010), and partners discussing a problem who have higher physiological linkage have significantly lower levels of relationship satisfaction (Levenson and Gottman, 1983). Other studies have found that cortisol (a glucocorticoid stress hormone) levels correlate more highly during the day in relationships with low satisfaction (Liu et al., 2013; Saxbe and Repetti, 2010) and those with relational aggression (Saxbe et al., 2015). In such cases, greater physiological linkage is associated with greater strain on the relationship and is likely to indicate a form of social allostatic load. Given that this social allostatic load is associated with dysregulated cortisol, sleep, and other physiological processes, such stressors act at both the level of the dyad to produce relationship distress and at the individual level to produce physiological and psychological wear and tear.

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19.6 IMPLICATIONS FOR PARTNERSHIPS AND THEIR TRANSITIONS

Several important inferences can be drawn from the neuroscience literature reviewed herein. First, partnerships can be a powerful force preventing stress and maintaining health over time. Because a high-quality relationship partner improves our ability to act in the environment and serves as a resource, we are better able to see challenges as manageable rather than overwhelming, and more likely to adapt to challenges as they arise. Intriguingly, perhaps in part due to the role of incentive systems in allostasis, greater dopamine response in early-stage romantic love predicts better relationship outcomes at a later time. The transition from unpredictable early-stage love to a more mature predictable relationship is likely to be a critical juncture in determining the quality of a relationship. Those couples who experience lower levels of DA activity in this period will be vulnerable to social allostatic load and relationship termination later.

Individuals in strained relationships are more likely to experience allostatic load and the wear and tear of chronic/intense stress. This is particularly challenging if a relationship is going through a significant transition. For example, the process of having children will increase the number of changes each member of the relationship must manage, increasing demand for allostasis. It is easy for individuals to begin to tip over into experiencing allostatic load, which eventually erodes physical and mental health. Simultaneously, the couple, as a unit, must adapt to the transition, placing more allostatic demand on the relationship. Failures to return to baseline after disruptions, repeated hits to members of the relationship, inadequate responses to allostatic demands, and a lack of adaptation to the new situation can all lead to problems in the relationship and exacerbating stress-related health issues in the couple.

Finally, the end of a partnership is a major challenge. Because we use other people as resources to manage allostasis, loss of a significant other may provide extra load on the individual. Alternatively, for people in highly distressed relationships, the end of the relationship may offer more flexibility to begin adapting and improve long-term outcomes. When transitioning out of a partnership it seems best to have a strong extended social network to help assist with stress management and to replace some of the resources lost with the partner.

Many questions are ripe for further research in this area. Social Baseline Theory predicts that perception of the world is scaled by the availability of relationship partners (Gross, 2020), suggesting that people may actually think and perceive differently in the presence of loved ones as opposed to when they are alone. Similarly, researchers have underappreciated importance of relationships in regulating biological systems despite evidence that blood glucose, sleep patterns, and thermoregulation are associated with interpersonal processes (Ein-Dor et al., 2015; Hofer, 2006; IJzerman et al., 2015; Saxbe et al., 2020). More work needs to be done to understand the complexities of how relationships impact health and well-being. Because relationships cut both ways, we need to have a stronger sense of how and when relationship dissolution is superior to relationship continuation. Moreover, we also have relatively little good research on the impact of friendships and other non-partnerships on biological aspects of health and well-being. A person's social needs can be met outside of a partnership, and the major barriers to meeting social needs that way are likely to be cultural barriers created by social norms. Finally, we need a much stronger understanding of relationship-health dynamics longitudinally across a larger range of contexts and levels of analysis. These complex systems must be viewed simultaneously and over time at the macro-level of social networks,

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meso-levels of inter- and intrapersonal processes, and micro-levels of systems and cellular biology.

Overall, relationships provide critical resources for our adaptation to challenge and management of stress. We are innately social in nature and require some amount of social contact and interaction to function. Despite this, poor-quality relationships often increase stress and impair resilience. In this way relationships can cut both ways and be a significant source of stress and ill-health, or a great boon to our health and well-being.

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PART V

PROCESSES INSIDE PARTNERSHIPS

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20. Money, work, and wealth in partnerships

Nicole Kapelle

Despite women's progress in educational attainment and labour force participation in Western societies, gender inequalities between different-sex partners have remained persistently large (England, 2010). Women have continued to maintain the primary responsibility for unpaid labour in the home, which is strongly intertwined with women's economic potential and, thus, economic inequalities between partners. Such disparities have the potential to affect autonomy and well-being, particularly of women. However, the relevance of intra-couple economic inequalities has often been overlooked. This is due to popular misconceptions that partners are financial units where (a) resources are shared and pooled irrespective of individual contributions, and (b) partners can equally and freely access all economic resources. Although there have been methodological and practical grounds for such assumptions (i.e., data limitations, complexity in questionnaire design, sensitivity of financial topics, etc.), such ideas have been deeply ingrained based on idealistic and traditional views about partnerships, particularly marriage. Such assumptions, however, do not necessarily hold, and fail to describe the lived reality of most couples.

The present chapter explores the magnitude, causes, and consequences of economic intra-couple inequalities, focusing on different-sex couples within Western societies. Section 20.1 starts with an overview of the extent of intra-couple inequalities, focusing on income, pensions, and wealth. To highlight the relevance of economic intra-couple inequalities, section 20.2 presents theoretical approaches to control, power, and decision-making within the household. Becker's New Household Economic theory is contrasted with more recent resource-bargaining perspectives and gender theories. Because individual control and power over economic resources are heavily interwoven with the degree to which money is pooled or kept separately, section 20.3 further explores how money is allocated and managed within partnerships. Section 20.4 highlights the different drivers of intra-couple inequalities. This section also points out some relevant contextual aspects that fuel or dampen inequalities between partners. The chapter concludes with a discussion of limitations to quantitative intra-couple research and potential ways forward.[1]

20.1 MEASURES AND STATUS QUO OF INTRA-COUPLE ECONOMIC INEQUALITIES

To assess economic disparities between partners, quantitative researchers have overwhelmingly focused on income inequalities and commonly measured those as the intra-couple earnings gap. This gap is defined as a woman's earnings share relative to the sum of her and her partner's earnings. Within this context, earnings refer to income from employment and—depending on the study—other sources, such as unemployment benefits and income from investments. Considering all couples irrespective of partners' level of labour force participation, research commonly found that women in cohabiting or married partnerships earn approx-

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imately 20 to 40 per cent of couples' income (Bianchi et al., 1999; Dotti Sani, 2015; Haupt and Strauß, 2022; Stier and Mandel, 2009). Overall, smaller intra-couple income gaps were found in more gender-egalitarian contexts and more significant gaps in more conservative contexts (Bianchi et al., 1999; Dotti Sani, 2015; Stier and Mandel, 2009). Within Europe, Grow and Van Bavel (2020) show that the share of couples in which women contribute nothing to the couple's earnings ranges from 5 to 10 per cent in the Scandinavian countries and up to 36 per cent in Greece. Logically, a woman's earnings share increases with her participation in the labour market and rising number of hours worked. Thus, dual-earner couples' income disparities are substantially smaller (Dieckhoff et al., 2020). Nevertheless, even women in those couples commonly earn less than their male partners across Western societies (Bianchi et al., 1999; Stier and Mandel, 2009). Additionally, male partners often do not only earn more than their female partners even if women work full-time but there is also a striking discontinuity in female partners' relative contributions to couples' income at the point where women start to outearn their male partners (Grow and Van Bavel, 2020). Specifically, many female partners contribute just a bit less than or as much as their husbands, but very few contribute more and presume the role of the female breadwinner. As such, female breadwinner households remain an exception and are often a result of male partners' under- or unemployment (Vitali and Arpino, 2016).

Once labour market activities and associated earnings cease due to retirement entry, individuals rely heavily on their pension income. Depending on the pension system, pension income largely reflects an individual's level and years of overall earnings contributions to a pension fund during their working age. Considering that women earn substantially less than their male partners and are more likely to have care-related career breaks over their working-age years, it is not surprising that earnings inequalities also translate into inequalities in pensions. While the pension coverage rate between female and male partners is relatively equal across most Western societies, the pension income gap amongst European couples where both partners receive a pension is substantial, with women receiving on average 42 per cent less pension income than their male partner (Betti et al., 2015).

Intra-couple inequalities in earnings not only translate into pension inequalities but are also a relevant driver of inequalities in personal net wealth (i.e., personally owned and the individual share of jointly owned assets minus liabilities). Women's lower earnings translate directly into lower savings potentials. Lower earnings are also linked to lower and fewer fringe benefits (e.g., employer bonuses and performance incentives, employee stock and equity options, etc.) that can be used to increase savings and investments. Although financial transfers, including inheritances or *inter vivos* (i.e., transfers made during the grantor's lifetime), are another essential pathway of wealth accumulation, inheritances seem less gendered: most Western laws prohibit the discrimination of heirs based on gender. However, research on potentially gendered *inter vivos* transfers is inconclusive across countries, and more research is needed to understand whether and how such transfers may contribute to intra-couple inequalities (Bessière, 2022; Nordblom and Ohlsson, 2011).

Understanding intra-couple inequalities in wealth, in addition to inequalities in income, is crucial because the two measures capture different aspects of economic well-being. Income refers to the current "flow" of financial resources generally used to cover daily consumption costs but is also highly susceptible to sudden changes, for instance, due to unemployment. On the contrary, wealth refers to a "stock" of resources that can support current and future con-

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sumption even in the absence of income, providing an important real and psychological safety net (Killewald et al., 2017; Spilerman, 2000).

Considering that wealth is partially accumulated through income, women were also found to hold substantially less wealth than their male partners—considering wealth owned independently of the other partner and the personal share of jointly held wealth (Frémeaux and Leturcq, 2020; Grabka et al., 2015; Kapelle and Lersch, 2020; Lersch and Schunck, 2023). In Germany, Austria, and the US, the net wealth of women is, on average, €33 000, €60 000, and $23 000 lower than that of their male partners, respectively (Grabka et al., 2015; Lersch and Schunck, 2023; Rehm et al., 2022). This translates into women owning about 28 to 34 per cent of their male partner's average wealth across these three contexts. However, it must be acknowledged that men do not out-own their female partners across all couples. In Germany, for instance, the intra-couple wealth gap is driven by 52 per cent of couples where the male partner owns more than the female partner compared to 19 per cent where she out-owns her male partner and 29 per cent of couples without a wealth gap (Grabka et al., 2015). Due to the limited availability of individual-level wealth data, research on wealth within couples remains sparse and is limited to a few countries.

20.2 THEORETICAL APPROACHES TO THE RELEVANCE OF INTRA-COUPLE ECONOMIC INEQUALITIES

After highlighting the magnitude of economic inequalities within couples in section 20.1, the question arises whether such inequalities are substantially relevant to partners' well-being. Hence, do intra-couple income, pension or wealth differences relate to or enable other inequalities between partners?

Based on assumptions of early neoclassical economic approaches that date back to Becker's well-known work *A Treatise on the Family* (1981) and his New Household Economic theory, intra-couple inequalities are not a concern for the well-being of either partner and their children. According to Becker (1981), households act as a homogeneous unit with a single utility function where any personally generated economic resources are considered household resources. This ignores any plurality of decision-making within the household. Instead, it assumes that all household members share the preferences of the household head—traditionally the man—who acts in an altruistic manner in the distribution of resources to guarantee equal well-being of all family members. Although assumptions around a unitary household may still hold for some couples, such assumptions have been deeply entrenched in normative perceptions about an institutional marriage that focuses on jointness between spouses rather than individuality (Cherlin, 2004).

Starting in the 1970s and 1980s, a large body of research heavily criticised and contested Becker's assumptions (see, for instance, Bennett (2013) for an overview). Such studies were primarily based on two theoretical approaches: resource-bargaining perspectives and perspectives related to gender display and norms. In contrast to Becker's assumptions about shared preferences in household decision-making, resource-bargaining perspectives postulate that partners may have conflicting interests. These conflicts are settled based on power relations where the partner with higher individual endowments has more bargaining and decision-making power (Blood and Wolfe, 1960; Brines, 1994). Although resources-based bargaining theories are essentially gender-neutral, decision-making processes, preferences,

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and money are gendered. Specifically, previous research highlighted that men commonly have the final say, particularly over more significant and critical investments, while women are more involved in everyday spending related to the domestic sphere (Klesment and Van Bavel, 2022; Tichenor, 2005). Additionally, women's economic contributions are perceived as secondary to men's contributions, largely irrespective of their actual contributed share (Nyman, 2003; Pahl, 1995; Zelizer, 1989). This reflects gendered perceptions and behaviour in line with deeply ingrained traditional social norms around men's role as the provider and head of the household with decision-making power, while women are expected to be the dependent wife and mother responsible for homemaking (Lorber and Farrell, 1991; West and Zimmerman, 1987).

A woman's decision-making power and control increases as her absolute and relative resources increase within the couple. This has been shown to benefit her and her children's subjective and economic well-being (Bonke and Browning, 2009; Pahl, 1995). However, women's financial independence violates previously mentioned social norms about gender roles within the household (Bittman et al., 2003; Brines, 1994; Lorber and Farrell, 1991). As such, women and men may seek to neutralise norm violations through compensatory behaviour. For instance, women with substantial economic resources may not fully exercise their associated bargaining power. Instead, decision-making power—particularly over more significant financial matters—may be passed back to the male partner or decisions may be made jointly (Klesment and Van Bavel, 2022). Early studies also argued that increases in a woman's relative financial contributions—particularly beyond where she owns more than her partner—are linked to a couple's reversal to a more traditional division of domestic labour (Brines, 1994). More recent studies have, however, questioned this link and found no or little evidence supporting gender display in housework related to women's household income contributions (Gupta, 2007; Hook, 2017; Sullivan, 2011).

20.3 MONEY MANAGEMENT AND ACCESS TO RESOURCES

The level of intra-couple economic inequalities and individual access to and control over financial resources is heavily interwoven with the degree to which money is pooled or kept separately. How money is allocated and managed within partnerships is complex, as work by Pahl and Vogler has illustrated (Pahl, 1995; Vogler et al., 2006). However, two broad extremes are possible: partners may pool all economic resources or keep their resources completely separate. Both extremes of money allocation systems have different advantages and disadvantages for resource access and control.

Resource pooling allows partners to provide access to each other's individually and jointly generated resources. This may be particularly beneficial if intra-couple inequalities are significant and one partner needs to be financially compensated, for instance, due to forgone wages during career breaks (Althaber et al., 2023). However, pooling does not necessarily lead to equal access and control over those resources (Burgoyne et al., 2007; Vogler et al., 2006). The partner with lower or no income contributions—commonly the woman—may be perceived as owning a smaller share of pooled resources. Because ownership is linked to the access and control of resources (Pahl, 1995; Zelizer, 1989), men are likely to exercise more control over pooled money, while women feel less entitled to do so. Underlying this process are notions about—potentially subtle and unconscious—gendered negotiations (Dema-Moreno, 2009;

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Nyman, 2003). Overall, women's lower control over and access to joint resources has been shown to limit women's personal spending. This is particularly the case if children are present, as women tend to cover children's financial needs before settling their own needs (Lanau, 2023).

Conversely, keeping personal resources in separate accounts allows unrestricted personal access to and control over these funds because partners may operate—to some degree—as two separate economic entities (Vogler et al., 2006). Additionally, couples that practise (full or partial) resource separation often aim to navigate the conflicting norms of autonomy and jointness through open negotiations and discussions about financial responsibilities (Vogler et al., 2006). Despite the advantages of resource separation, it can also limit the spending capacity of the lower earnings spouse—commonly the woman—particularly if intra-couple inequalities are substantial. This may ultimately disadvantage children as women are commonly responsible for settling child-related costs (Pahl, 2005). Overall, both extremes of money management—pooling or separating money—have the potential to lead to different living standards between partners within the same household, depending on partners' circumstances and characteristics.

Due to the different levels of autonomy, control, and decision-making power associated with whether resources are pooled or held separately, researchers have illustrated that money management varies substantially across couples (Pahl, 1995; Vogler et al., 2006). Because joining resources blurs the boundaries of ownership and control and increases dependence between partners, the likelihood to pool or partially pool resources increases as partners signal long-term commitment, for instance, through marriage and parenthood (Eickmeyer et al., 2019; Lauer and Yodanis, 2011; Pepin, 2022). In turn, the likelihood of pooling resources decreases if partners signal doubt and uncertainty about the partnership's future or have previously experienced a union dissolution (Burgoyne and Morison, 1997). Furthermore, pooling of resources is less likely for partners who can "afford" or prefer financial independence, which is commonly the case for higher educated partners or couples in which women work (Burgoyne et al., 2007; Lott, 2016). Keeping resources separate is also more common for cohabiting partners than married ones (Evans and Gray, 2021; Hiekel et al., 2014). On the one hand, cohabitation may not (necessarily) signal long-term commitment and often provides limited legal protection in case of separation (Perelli-Harris and Gassen, 2012). On the other hand, cohabitation is more selective of gender-egalitarian partners. Finally, as attitudes have become overall more gender egalitarian over recent cohorts, individualised money management systems have become more common, not just in cohabitating unions but also in marriages (Hu, 2021).

20.4 CONTEXTUAL DRIVERS OF ECONOMIC INTRA-COUPLE INEQUALITIES

A range of complex and interconnected factors have been discussed in the literature to explain intra-couple economic inequalities. As the accumulation of wealth and pension entitlements is heavily connected to women's and men's income during their working lives, most drivers, first and foremost, are linked to earnings disparities—referring predominantly to income from employment—and subsequently translate into pension and wealth disparities.

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Before discussing couple-related drivers, it must be acknowledged that women usually earn less than men, irrespective of their relationship status (Blau and Kahn, 2007). Across the EU, women earn on average 14 per cent less than men on an hourly basis, with the highest unadjusted pay gaps of above 20 per cent in the Czech Republic, Germany, Austria, and Estonia (Leythienne and Pérez-Julián, 2022). Similar unadjusted pay gaps can be found across Western countries, including the US, Canada, and Australia. Pay differences emerge *inter alia* through occupational segregation, where women and men tend to work in different industries, with an undervaluation of jobs within female-dominated sectors (e.g., education, health care, etc.). Additionally, women are less likely to hold managerial positions, which commonly offer higher salaries (Arulampalam et al., 2007). However, even within the same occupation or industry and once potential differences in education, responsibility, or work experience are accounted for, women tend to have lower wages than men (e.g., de Ruijter et al., 2003). Such differences are commonly attributed to employer discrimination and bias, both overt and subtle, affecting, for instance, hiring, promotions, and salary negotiations (e.g., England et al., 1996; Hipp, 2020; Wade, 2001). Finally, and most importantly, women are more likely to work fewer hours (e.g., part-time) or have employment interruptions than men. While this fuels the previously mentioned drivers of pay differences, it also leads to a depreciation of women's human capital and, thus, lower pay and a lower capacity to accumulate pension entitlements and wealth over the life course (Polachek, 1981).

Differences in working hours or employment interruptions are closely linked to intra-household gendered decision-making on career aspects and family responsibilities. Across most societies, female partners spend substantially more time on unpaid domestic labour, including care work, than their male partners, restricting women's capacity to engage in paid labour (Baxter, 2002; Kan et al., 2022; Sayer, 2005). A range of theoretical approaches have been used to explain this gendered division of paid and unpaid labour, including the previously mentioned theory by Gary Becker. Becker (1981; 1985) sees specialisation as a way to maximise the household's overall production. Each partner is expected to focus on one productivity domain (i.e., unpaid or paid labour) based on their respective earnings potential. Becker (1985) also assumes that women have a predisposition to "specialise" in non-market work based on inherent biological differences. The sociological resource-bargaining approach sees the gendered division of labour as a result of spouses' negotiations about obligations and resources (Blood and Wolfe, 1960; Brines, 1994). The partner with higher individual endowments (i.e., income, savings, etc.) can negotiate out of doing "undesired" housework. While these approaches are gender-neutral in their essence, a large body of research has argued that the division of labour is embedded in strong, internalised social norms around the nurturing role of women that seems incompatible with career aspirations while men are perceived as the economic provider (Alwin et al., 1992; Gorman and Fritzsche, 2002; Lorber and Farrell, 1991; West and Zimmerman, 1987).

Gender norms and the display of gendered behaviour differ substantially across time, contexts, and couple types. Because egalitarian attitudes are particularly strong within cohabiting couples, the division of labour is generally more equal in cohabitation than in marriage (Bianchi et al., 2014). In contrast, a more traditional division of labour within marriage was not only socially encouraged but even institutionally enforced for most of the nineteenth and early twentieth centuries when women across Western societies needed their husband's permission to be able to work for pay. Legal changes have since ensured women's autonomy and equal economic opportunities. At the same time, the prevalence and support for norms around a male

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breadwinner and female homemaker model have eroded, and it has become widely expected that women also contribute financially to the household (Pepin and Cotter, 2018; Scarborough et al., 2019). Nevertheless, female partners are still expected to do the lion's share of domestic and particularly care work, with motherhood often seen as irreconcilable with (full-time) employment—particularly if children are still young (Treas and Widmer, 2000). Thus, while the negative association between women's transition into marriage and their labour market participation and income has weakened or disappeared in most Western societies over recent decades (Hoffman, 2009; Killewald and Gough, 2013), the transition to or even anticipation of parenthood—or other care-responsibilities—continues to drive women out of (full-time) employment and into strong and lasting economic dependence to fulfil the role as the primary carer and nurturer (Baxter et al., 2008; Dotti Sani, 2015; Musick et al., 2020).

Country contexts, including specific norms and structural factors, matter substantially in developing and persisting intra-couple inequalities in economic outcomes and the division of labour. Specifically, countries differ vastly in enabling women to balance care work and paid employment while encouraging men's engagement in unpaid labour. Negative associations between care work and female partners' household income contributions are lowest in countries strongly supporting gender equality in the public and private sphere (Anxo et al., 2006; Musick et al., 2020). Three contextual areas shall be highlighted of particularly high relevance: first, *regulations and social norms around working hours* that limit full-time employment hours while establishing a work culture that respects such limits and provides some flexibility can free up time for unpaid labour and particularly care work (Gornick and Meyers, 2003; Hook, 2006). However, if flexible working hours are mainly used by women, such practices reinforce prejudices and gender discrimination. Second, the availability of *paid (maternity) leave* enables new mothers to take time off from work to carry out care work while temporarily replacing some or all forgone wages.[2] However, while shorter paid leave encourages mothers' return to the labour market, extended leave hinders mothers' re-entry and penalises their wages while encouraging a persistently traditional division of labour between partners. Additionally, parental leave primarily or exclusively offered to and used by female partners substantially reinforces a traditional division of labour. This highlights the need for paid, *father-specific parental leave* regulations (Gornick and Meyers, 2003; Hook, 2006).[3] Third, the availability of *affordable or subsidised childcare* for children of all ages positively affects mothers' labour force re-entry and attachment, encouraging female partners' financial independence throughout their life course. However, as Hook (2006) points out, publicly funded childcare does not challenge fathers' involvement in care work and may thus maintain traditional gender ideologies.

Finally, assortative mating and mating preferences may play a role in intra-couple inequalities. Partners are commonly more alike than two randomly selected women and men (Schwartz, 2013). However, research has highlighted that women, more than men, prefer financially well-off partners. Additionally, female partners are commonly younger than male partners (Schwarz and Hassebrauck, 2012). As a result, women have less labour market tenure, leading to lower income and less time to accumulate wealth or pension entitlements before the relationship compared to their male partners. As previously highlighted, a range of theoretical approaches emphasise the relevance of such initial differences for household-level decisions on which partner's career to prioritise.

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20.5 CONCLUSION

The present chapter highlights the prevalence of substantial economic inequalities between partners to the disadvantage of women. Such disparities in the private sphere have been widely overlooked despite some successful efforts towards more gender equality, as illustrated by women's advances in their educational attainment and labour market participation rates. The oversight of intra-couple inequalities, which are still institutionally supported, for instance, through parental leave policies, is embedded in widespread normative ideas of a common economic consensus between partners. As highlighted in this chapter, such assumptions do not necessarily hold because partners may have conflicting interests and need to negotiate financial decisions. Such negotiations are settled based on power relations and are intertwined with gendered behaviour and role expectations. Women's lower economic contributions to the household are linked to lower power, with potentially detrimental consequences for women's and children's well-being. Driving factors behind intra-couple inequalities are the persistent imbalance in the division of domestic labour, mainly related to parenthood, and closely connected inequalities within the labour market.

Our understanding of inequalities in the private sphere is still in its infancy. Next to the general oversight of the family as a place of inequalities due to misconceptions about the couple as an economic unit, a range of methodological challenges has also limited (quantitative) research efforts. First, wealth and pension income are hard to measure because of their complexity in combination with the common financial illiteracy of survey respondents around pension entitlements or market values of wealth components. For wealth, researchers face the additional challenge that wealth is often only measured at the household level or that questions about the personal share of joint wealth components are ambiguous regarding whether they measure legal or perceived ownership shares (Joseph and Rowlingson, 2012). To address the lack of intra-couple research, particularly on pension income and wealth, survey datasets need to include more comprehensive economic measures at the personal level. This would also provide a fruitful basis for robust cross-country studies that can provide a better understanding of the relevance of contextual factors.

While earnings data are more readily available in surveys than pension income or wealth, studies on earnings are also prone to error. The desire for social conformity has led survey respondents to over-report socially favourable behaviour and under-report less favourable behaviour (Krumpal, 2013). Comparing self-reported income with income reports in administrative data, Roth and Slotwinski (2020) and Murray-Close and Heggeness (2019) found that when wives out-earn their husbands, respondents reduced this social norm violation by inflating the husband's earnings and deflating the wife's earnings. Similar patterns of socially desirable reporting may also apply to pension income or wealth and even the division of labour, although no research has specifically examined these aspects yet. Thus, measurement error due to misreporting is likely to lead to an underestimation of inequalities between partners, which feeds into the oversight of such inequalities more broadly. To this end, more linkage of survey and administrative data and a critical assessment of survey methodology for couple research is required. Linking administrative and survey data and broader access to administrative data may also allow for exploring fine-grained variation and intersectionality in intra-couple inequalities that current research lacks (e.g., race, class).

Overall, previous research across Western societies clearly highlights that female partners earn and own less than male partners during working age and beyond. These inequalities may

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be detrimental because they may lead to women's lower autonomy, control, and power over financial decision-making. Women's financial dependence on their partners may restrict their financial independence and economic well-being within the partnership. However, it also needs to be acknowledged that such intra-couple inequalities may not necessarily be perceived as detrimental, particularly if partners show high marital quality and satisfaction with the marriage and money management arrangements. Thus, large individual variations within the perceptions and lived realities of such inequalities are possible. Irrespective of whether intra-couple economic inequalities are perceived as a disadvantage for women during the partnership, such inequities can potentially increase women's economic vulnerability in the case of widowhood or separation and divorce. To overcome intra-couple inequalities, policies and norms (e.g., about working hours, parental leave, etc.) need to enable an equal division of domestic labour throughout the life course irrespective of the presence of dependent children. This is also closely intertwined with important initiatives to reduce the gender pay gap, which would subsequently improve women's accumulation of wealth and pension income. Thus, increasing equality in the private sphere will be likely to reinvigorate the gender revolution.

NOTES

1. Next to the present chapter, other researchers, including Evertsson and Nyman (2021), Kulic and Dotti Sani (2020) and Bennett (2013), have previously provided excellent overviews around the topic of money within couples.
2. An exception across OECD countries is the US, where employers are not obligated to provide paid parental leave.
3. See Koslowski et al. (2022) for a detailed cross-country overview of leave policies.

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21. The partnership context of childbearing

Júlia Mikolai

Since the 1950s, profound changes have occurred in partnership and family dynamics across the Western world. Marriage and the transition to parenthood have been postponed, and the traditional sequence of family formation (i.e., marriage, followed by living together and having children) became less prevalent as new steps emerged in the life course, including living alone, non-marital cohabitation, union dissolution, divorce, and re-partnering (Furstenberg, 2014; Thomson, 2014; Van Winkle, 2018). These changes have implications for the partnership context of childbearing, that is, the type of partnership (e.g., single or separated unpartnered, cohabitation, marriage, re-partnering) children are born in.

These changes were brought about by a set of interrelated and complex factors (Furstenberg, 2014) including the gender revolution (Goldscheider et al., 2015), changes in the economic and social structure (e.g., the expansion of higher education or women's increased labour force participation), in technology (e.g., the contraceptive pill and the digital revolution), in norms and values (e.g., individualisation, self-fulfilment and weakening normative regulations), and in the meaning of different types of partnerships (Heuveline and Timberlake, 2004; Hiekel, 2014). As these factors are highly interrelated (Sobotka, 2004), it is not clear how exactly these processes relate to each other and to changing partnership and family formation.

This chapter starts by reviewing the basic trends in the changing partnership context of childbearing across European countries. Then I describe the main theories that provide competing explanations for why individuals may have children outside marriage. Finally I summarise the state-of-the-art regarding the empirical literature on the partnership context of childbearing. The chapter concludes with summary remarks and highlights potential directions and challenges for future research.

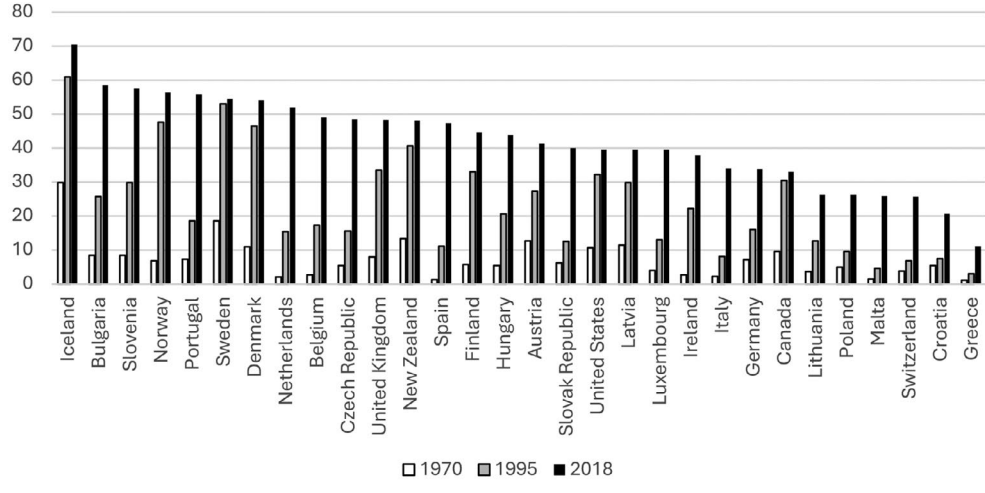
21.1 TRENDS IN NON-MARITAL CHILDBEARING

Non-marital childbearing is an umbrella term indicating births outside of a marital relationship. This includes births to never partnered and separated single parents as well as those who have a child whilst living together with a partner unmarried (i.e., cohabitation). Figure 21.1 shows the proportion of births outside of marriage in selected European and other Western countries in 1970, 1995, and 2018 using data from the OECD Family Database,[1] which relies on national official statistics. The proportion of births outside marriage has increased dramatically across all examined countries, although the trends and patterns vary considerably across countries. Whereas in 1970 less than 10 per cent of all births were to unmarried mothers in most countries (notable exceptions being Iceland and Sweden), by 2018 more than 50 per cent of births occurred outside of marriage in many Nordic countries but also in Bulgaria, Slovenia, Portugal, and the Netherlands. The share of non-marital births was also high (around 40 to 50 per cent) in many Western and in some Central (e.g., Hungary, Czech Republic, Slovakia)

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and Southern (e.g., Spain) European countries. Finally, it was around 30 per cent or less in Germany, Switzerland, or Italy.

These figures also indicate that non-marital childbearing spread earlier and more quickly in most Nordic countries, but also in the UK, US, New Zealand, Canada, and Latvia. Its spread was the slowest and latest in Southern Europe and in Croatia, Switzerland, and Lithuania. Additionally, in many countries, the increase in the proportion of non-marital births was larger between 1995 and 2018 than between 1970 and 1995. Such cross-national differences in the level and pace of changes in the proportion of non-marital births highlight the increasing heterogeneity between countries over time.



Source: OECD Family Database, SF2.4. Share of births outside of marriage.

Figure 21.1 Proportion of births outside of marriage in selected European and Western countries, 1970, 1995, and 2018

Differences in the prevalence of non-marital childbearing across countries are due to differences in a set of interrelated factors including cultural and historical differences, differences in the pace of changing norms and values (Surkyn and Lesthaeghe, 2004), East/West and North/South differences in family systems (Reher, 1998), differences in the meaning of cohabitation and marriage (Heuveline and Timberlake, 2004; Hiekel, 2014), and differences in institutional settings, that is, different welfare state regimes (Esping-Andersen, 1990; Gauthier, 2002), legislation (Perelli-Harris and Sánchez-Gassen, 2012), and different levels of gender equity (Goldscheider et al., 2015; McDonald, 2000a).

Using data from official statistics does not allow for distinguishing between non-marital births to cohabiting and to single women, to never partnered and separated single women, or to differentiate between first and higher order births. Such data also cannot shed light on the key socio-economic determinants of non-marital childbearing. Research using survey data has shown that most of the increase in the share of non-marital births was mainly a result of the increasing proportion of first births to cohabiting women rather than to single women

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(Bumpass and Lu, 2000; Kennedy and Bumpass, 2008; Perelli-Harris et al., 2010) except in the UK (Kiernan, 2004a; 2004b) and the US (Heuveline et al., 2003) where the share of births to single mothers has also increased substantially. Additionally, studies using survey data have shown that most of the non-marital births are to cohabiting couples rather than to single women but the share of these two types of non-marital births varies across countries and time periods (Perelli-Harris et al., 2010). Births to single mothers are rare, typically amounting to less than 10 per cent of all births (Perelli-Harris et al., 2012; Sobotka and Berghammer, 2021).

21.2 EXPLANATIONS FOR THE INCREASE IN NON-MARITAL CHILDBEARING

There has been much debate in the literature about the potential explanations underpinning the increase in the proportion of births to unmarried parents (see also Perelli-Harris and Sassler, Chapter 4). Two competing explanations exist in the literature. First, theorists of the Second Demographic Transition (SDT) argue that the major demographic changes that took place across Europe since the 1960s (e.g., declining or postponed marriage and childbearing) were not only demographic in nature but also closely linked to value change (Lesthaeghe and Van de Kaa, 1986). Self-development and self-fulfilment have become more important in individuals' lives as a result of an increase in living standards, gender equality, and female autonomy coupled with weakened normative regulations. New lifestyle choices, related to an increase in higher-order needs (Maslow, 1954) and self-realisation, led to changes in family behaviours (Surkyn and Lesthaeghe, 2004). Thus, the SDT sees changing family behaviours as a manifestation of ideational and value changes.

According to the SDT, individuals with more egalitarian and secular values are most likely to choose new living arrangements to fulfil their needs for self-development and individualism and cohabit with a partner (Lesthaeghe and Neidert, 2006; Surkyn and Lesthaeghe, 2004). Previous research interpreted the diffusion of new family behaviours, including non-marital cohabitation and childbearing, as support for the SDT in the United States (Lesthaeghe and Neidert, 2006; Raley, 2001) and Europe (Lesthaeghe, 2010; Lesthaeghe and Moors, 2000; Surkyn and Lesthaeghe, 2004).

Second, the Pattern of Disadvantage (POD) idea argues that new family behaviours, such as cohabitation and childbearing within cohabitation, reflect structural differences and economic circumstances in conjunction with changes in values and attitudes (Perelli-Harris and Gerber, 2011; Perelli-Harris et al., 2010). Socio-economic disadvantage combined with the financial costs of marriage mean that individuals from lower socio-economic backgrounds face constraints to marry (Koops et al., 2021a). Two main reasons have been suggested in the literature for understanding why more disadvantaged women may be more likely to have a child outside marriage: lack of a suitable marriage partner and lack of financial resources required to marry (Koops et al., 2021a). Qualitative research from the US (Edin, 2000; Edin and Kefalas, 2005) suggests that disadvantaged women may choose to have a child to provide meaning in their lives but at the same time they may see their partners as economically or socially unsuitable for marriage due to, for example, male unemployment or the lack of financial resources to get married (also see Berrington et al., 2015; Oppenheimer, 1988; Smock et al., 2005; Wiik et al., 2010). In Europe and Australia, focus group research revealed that cohabitation is seen as a testing ground for relationships, and it represents freedom and a lower level of commit-

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ment than marriage (Perelli-Harris et al., 2014). Many respondents felt that marriage is not a requirement or the norm for childbearing and that other, more pressing needs take priority over marriage (Berrington et al., 2015). Taken together, these studies suggest that cohabitation and non-marital childbearing arise due to economic necessity, uncertainty, and instability (Perelli-Harris and Gerber, 2011; Perelli-Harris et al., 2010). In other words, the POD argument predicts that those from lower socio-economic backgrounds tend to experience new types of relationships and have children within alternative family forms (Berrington, 2001; Perelli-Harris and Gerber, 2011; Perelli-Harris et al., 2010).

21.3 PREVIOUS RESEARCH ON THE PARTNERSHIP CONTEXT OF FIRST BIRTHS

Most studies on the partnership context of childbearing across Europe have focused on first births (e.g., Mikolai et al., 2018; Perelli-Harris and Gerber, 2011; Perelli-Harris et al., 2010). Women can experience a first birth within marriage, while being single, or within cohabitation. Across Europe, young adults used to leave the parental home to marry, followed by co-residence, and childbearing (Sobotka and Berghammer, 2021). If a pregnancy occurred outside of marriage, it was the norm to legitimise it via marriage (Holland, 2013). With changing norms, values, and societal expectations, the decline of the role and importance of religion, as well as changing legal frameworks, cohabitation has begun to replace marriage as the most common type of co-residential union especially in Northern and Western Europe (Sobotka and Berghammer, 2021) and the meaning of marriage has changed over time and across countries (Holland, 2013). With the decline in marriage and the increasing share of unions starting as cohabitation, marriage is no longer the only accepted partnership context for childbearing, and hence an increasing share of births take place outside marriage (Perelli-Harris et al., 2010; Sobotka and Berghammer, 2021).

Many studies have explored the social, economic, and demographic determinants of childbearing outside marriage in contemporary Western societies (e.g., Koops et al., 2017; 2021a; 2021b; Mikolai et al., 2018; Perelli-Harris and Gerber, 2011; Perelli-Harris et al., 2010). This includes both studies that focused on childbearing within cohabitation as well as births to single mothers. Although births to single and cohabiting mothers are often considered under the umbrella of 'non-marital' childbearing, these two types of non-marital births are conceptually different. Single mothers are those who have a child in the absence of a co-residential partner. These births are more likely to be unplanned and occur to younger women than births to partnered women (Brzozowska, 2014; Hayford and Guzzo, 2015; Lorentzen and Syltevik, 2023). Having a child whilst cohabiting, on the other hand, is a couple decision, where part of the decision may be not to marry at all or to marry sometime after childbirth (Edin, 2000; Edin and Kefalas, 2005; Perelli-Harris et al., 2012; Perelli-Harris et al., 2014). Below, I summarise the empirical evidence on these two types of non-marital births together, but it is important to bear in mind the above-mentioned conceptual differences between the two.

A large body of empirical literature has focused on the link between socio-economic status and the risk of having a first child within cohabitation or whilst being single to understand how new family behaviours spread across different societal groups (Perelli-Harris et al., 2010). The first group of studies have used individuals' own level of education as a proxy for socio-economic status as it can be easily and reliably measured across countries in available

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large-scale longitudinal secondary data sources. Early evidence from the United States has shown that non-marital childbearing was most common among women who had lower levels of education and was associated with economic disadvantage (Aassve, 2003; Rindfuss et al., 1996; Upchurch et al., 2002). However, as American families tend to be more fragile than European families (Cherlin, 2010), it is not possible to generalise from these findings to the European context. More recently, studies have examined the role of educational level for non-marital childbearing in Europe. For example, Perelli-Harris et al. (2010) studied the educational gradient of non-marital childbearing across several European countries using competing risks models on a range of national surveys. They found that childbearing within cohabitation was associated with lower levels of education across eight European countries (Austria, France, Italy, Norway, Russia, the Netherlands, the United Kingdom, and Germany), which broadly represent different European regions. Similar findings have also been shown in other European studies (Mikolai et al., 2018) as well as in national contexts such as Russia (Perelli-Harris and Gerber, 2011), Hungary (Mikolai, 2012; Spéder, 2004) or the United Kingdom (Berrington, 2001; Ermisch and Francesconi, 2000; Steele et al., 2006).

Another group of studies has focused on the role of parental education, a key indicator of the transmission of (dis)advantage from parents to children across Europe and North America (Koops et al., 2017; 2021a; 2021b). This may be a better measure of socio-economic status in the transition to motherhood than individuals' own level of education as it does not suffer from the issue of reverse causality (Koops et al., 2017). For example, single births often occur to young mothers, which may lead to school dropout, thus reducing individuals' level of education (Hoffman et al., 1993). Various mechanisms can explain the association between parental education and individuals' partnership context at first birth. These include the intergenerational transmission of norms and behaviours regarding living arrangements and parenthood and of educational level, the worse marriage market opportunities of children from low-SES (socio-economic status) families lowering their chances of marrying, or that low-SES parents tend to invest fewer resources in their children, leading to reduced ability to supervise children who are more likely to have early and unsafe sexual intercourse (Koops et al., 2017; 2021a; 2021b). These studies found that lower parental education was linked to a higher risk of a cohabiting and single first birth than higher parental education (Koops et al., 2017; 2021a; 2021b). For cohabiting births, this was especially the case in North American and Central and Eastern European countries but not in Western European countries (Koops et al., 2017; 2021a). For single births, this was found in North American and some (around half) European countries (Koops et al., 2021b). A potential limitation of the existing research is that it has measured socio-economic status using individuals' own or their parents' level of education. Much less is known about the role of other socio-economic factors such as (household) income (Perelli-Harris and Blom, 2022), occupational status, or employment status.

21.4 CHANGES IN UNION STATUS DURING PREGNANCY OR AFTER A NON-MARITAL BIRTH AND MULTI-PARTNER FERTILITY

The studies I have summarised so far have largely focused on the partnership context of first births. Fewer studies are available on partnership changes during pregnancy or after a non-marital birth even though partnership status may change following a non-marital

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pregnancy or non-marital birth and these changes may also be stratified by socio-economic status. Furthermore, cohabitations tend to be less stable than marriages (Mikolai et al., 2018; Perelli-Harris et al., 2012), implying that there is a higher risk of partnership dissolution after childbirths in non-marital relationships. However, evidence from the US suggests that this only holds for cohabiting unions with children that are de-coupled from marriage (Musick and Michelmore, 2015).

Regarding non-marital pregnancies, studies show that many cohabiting women who become pregnant marry their partner and have a marital first birth (Berrington, 2001; Holland, 2013; Perelli-Harris et al., 2012). Additionally, following a cohabiting birth, the majority of women marry across many European countries (Perelli-Harris et al., 2012). These findings indicate that marriage remains important for the majority of women across Europe but it is postponed to later stages in the family formation process (Perelli-Harris et al., 2012). Those with more resources (i.e., higher own or parental education) are less likely to get pregnant in the first place while single or cohabiting and if they do get pregnant, they are more likely to get married or move in together between conception and birth than those with fewer resources. This has been shown in Russia (Perelli-Harris and Gerber, 2011), Hungary (Mikolai, 2012), the UK (Berrington, 2001), the US (Lichter et al., 2014) and across North American and European countries (Koops et al., 2021b).

Although most studies on the partnership context of births have focused on first births, some recent studies have explored childbearing across multiple partnerships. These studies have shown that in most European countries, multi-partner fertility is rare (up to 9 per cent of total fertility) but it is more common in countries where first births outside of a partnership are also common (Thomson et al., 2020). Individuals with half-siblings are more likely to experience multi-partner fertility than those who do not have half-siblings (Lappegård and Thomson, 2018) and so are women who had a first child at a young age, and who are less educated (Thomson et al., 2014).

21.5 CONCLUSIONS AND DISCUSSION

This chapter has summarised the trends in non-marital childbearing across European and other Western countries and outlined the key competing explanations for why and how SES may be related to women's partnership context at the time of childbirth. I also reviewed the empirical evidence on the association between SES and non-marital childbearing and highlighted some studies that have examined partnership changes following non-marital pregnancy and non-marital childbearing as well as multi-partner fertility. The existing studies provide a solid evidence base highlighting that childbearing within cohabitation or whilst being single is most common among women with lower levels of own education or parental education across countries in the Western world. Whilst this body of research provides robust and up-to-date cross-national evidence on SES differences in non-marital childbearing, several questions remain unanswered.

First, most studies interpret the finding that lower educated women are more likely to have a child within cohabitation than more highly educated women as support for the POD argument. However, other explanations have also been put forward to understand changing partnership and family formation (Sobotka and Berghammer, 2021). For example, studies have highlighted the importance of economic conditions and economic uncertainty across

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societies that has emerged due to globalisation and technological change and has been particularly prominent since the 2007–2008 Great Recession (Mills and Blossfeld, 2005; 2013; Perelli-Harris et al., 2010; Sobotka and Berghammer, 2021). These changes have led to declining relative income, unstable employment, and rising uncertainty, leading young adults to postpone commitment and family formation (Mills and Blossfeld, 2013; Sobotka and Berghammer, 2021).

Another explanation focuses on the unprecedented change in women's lives due to the 'gender revolution' (Esping-Andersen and Billari, 2015; Goldscheider et al., 2015; McDonald, 2000b). Women have become more educated, economically independent, and tend to be engaged in the labour market throughout their life course. These changes have meant that women's family and labour market roles have become incompatible. The 'gender revolution' framework argues that when family roles become more gender-equal, marriage and fertility will increase, especially among highly educated women.

Second, recent focus group studies have confirmed some of the mechanisms that are often mentioned in the literature on the link between individuals' level of education and their decision making related to childbearing within cohabitation (Berrington et al., 2015; Perelli-Harris and Bernardi, 2015). However, the mechanisms and couples' decision-making processes related to other transitions on the pathway to family formation remain speculative. For example, we do not know much about the mechanisms leading to a single birth, be it among never partnered or separated unpartnered women. Similarly, decision-making processes related to pre-union or pre-marital pregnancy, or partnership transitions following non-marital childbearing remain underexplored. Future studies should aim to clarify these mechanisms via focus group research or interviews. Another, related shortcoming is the exclusive focus on women and women's partnership and fertility experiences although in most cases, these decisions are taken at the couple-level. Future studies should explore the mechanisms of decision making at the couple-level as well as the role of the partners' characteristics for the partnership context of childbearing.

Third, whilst many studies recognise the role of pregnancy and fertility or marriage intentions in the transitions leading to family formation, little is known about women's experiences of pregnancy loss and its role for the partnership transitions leading to a first live birth. As partnership formation and fertility are continued to be postponed to ever later ages, especially among women with higher levels of education, the duration between deciding to have a child and the time of the actual childbirth is likely to get longer for an increasing share of couples. Additionally, many couples experience (sometimes several) miscarriages (Macklon et al., 2002; Regan and Rai, 2000). The decision to have a child with someone signals long-term relationship commitment regardless of the type of partnership couples are in. Couples who decided to have a child but had to wait for a live birth for longer are likely to make life choices in light of their strong fertility intentions. Importantly, these couples have made a commitment to each other, unlike couples who did not make such a decision. The lack of this perspective in the literature is likely to be related to data limitations. Nonetheless, it is important to highlight the potential role of pregnancy loss, and the experience of infertility or subfertility in the family formation process as these are very common experiences and are likely to influence couples' partnership decision making.

Additionally, it would be interesting to study the role of potential markers of commitment (other than marriage) for the transition to parenthood. For example, getting engaged is a strong marker of the intention to marry (Sassler and Miller, 2011; Sassler and Miller, 2023) and

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signals that even if a birth or conception occurs whilst unmarried (but following engagement), a commitment has been made, as compared to those who have a child when not engaged. Similarly, couples may increasingly commit to buying a house together on a joint mortgage that may last a lifetime (Berrington et al., 2015). In many countries, the costs of a wedding are similar to a deposit needed to buy a home with a mortgage. Thus, couples may increasingly decide to buy a home together first or instead of getting married. Nonetheless, such a decision signals long-term commitment similar to that signalled by marriage. Future studies should explore these and other potential alternative markers of relationship commitment.

Finally, it would be useful to collect retrospective information not only on co-residential relationships (which is now routinely done in most longitudinal surveys) but also on non-residential relationships. This would allow us to distinguish among single births to women who are in a relationship from those who are not. It is likely that different mechanisms lead to these two types of single births, and the association of individual SES and the probability of experiencing these two types of single births may also differ.

NOTE

1. The OECD Family Database (https://www.oecd.org/els/family/database.htm) is a database of cross-national comparable indicators across OECD countries on family structure, labour market position of families, public policies for families and children, and child outcomes.

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22. Relationship quality

Jeremy B. Kanter, Susan Sprecher and Terri Orbuch

In decades of research on relationships, the most frequently examined issue is what factors contribute to achieving and maintaining a high-quality relationship. This chapter begins with a discussion of how relationship quality has been conceptualized and measured. Next, we consider the average trajectory of relationship quality and present evidence that a linear decline is not inevitable for all couples. The various factors that impact relationship quality are discussed in section 22.3 (individual factors), section 22.4 (relationship processes), and section 22.5 (external context). In section 22.6, we discuss how relationship quality is associated with individual (health and well-being) and broader family (e.g., children) functioning. Our chapter concludes with a discussion of interventions and policies that may help couples maintain high quality relationships and we offer suggestions for future research.

22.1 CONCEPTUALIZATION AND MEASUREMENT OF RELATIONSHIP QUALITY

Relationship quality is an umbrella construct that includes many specific indicators of the positivity or negativity of the relationship. Specific indicators incorporated under relationship quality include satisfaction, happiness, adjustment, support, well-being, commitment, disagreement, and conflict. Most measures of relationship quality are self-reports, and were developed with a focus on marriage (Locke and Wallace, 1959). Notably, this emphasis on marriage may obscure relationship development occurring prior to (e.g., cohabitation) and outside of marriage. Some relationship quality measures are referred to as omnibus; that is, they are multi-dimensional and include subscales that assess different aspects of the relationship (Fincham and Bradbury, 1987). For example, the Marital Adjustment Test (MAT; Locke and Wallace, 1959) includes items on many facets of the marriage, including couples' agreement about various aspects of the relationship, how much the partners confide in each other, and participation in outside activities together.

A drawback of these broad measures is that items included in such measures may overlap with other items included in studies assessing predictors of relationship quality (e.g., communication, conflict; Fincham and Bradbury, 1987). To remedy this potential issue, scales have been developed of more global evaluations of the relationship (e.g., Quality Marriage Index; Norton, 1983) including for all types of relationships (Relationship Assessment Scale; Hendrick, 1981). Single items (e.g., relationship happiness) to assess relationship quality are also often employed, including in large-population studies (Blom et al., 2023; Brown et al., 2017) and daily diary studies (Totenhagen et al., 2018b).

It should be noted that relationship quality is assessed almost exclusively by self-report (quantitative) measures that were developed with North American samples. Occasionally, qualitative studies are conducted on relationship quality in which participants are interviewed and asked about aspects of their relationship quality/satisfaction (e.g., Tavakol et al., 2020;

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Wong and Goodwin, 2009) or are observed interacting, and judgments are made about their relationship quality by the objective observers (e.g., Buehlman et al., 1992).

22.2 THE LONGITUDINAL COURSE OF ROMANTIC RELATIONSHIP QUALITY

Change (and stability) in relationship quality is associated with individual, dyadic, and broader family functioning (Proulx et al., 2017). Understanding how relationship quality changes over a long-term relationship is of interest to scholars and the broader public. Various theoretical frameworks highlight different periods of a long-term relationship as most influential in understanding change in relationship quality. The *enduring dynamics model* contends that individuals who begin marriage relationally distressed tend to sustain this distress over time, whereas those who are satisfied early on sustain high levels of satisfaction. Alternatively, other models suggest that most individuals report high levels of satisfaction early in marriage, with decreases as a result of couples' inability to navigate challenges (*emergent distress*) or as they experience unmet expectations (*gradual disillusionment*; see Proulx et al., 2017).

Longitudinal studies are best suited to test the aforementioned theories. Early work found a *honeymoon-is-over* effect (Kurdek, 1999), in which partners are initially highly satisfied but then over time experience declines in satisfaction. While informative, an emphasis on the average trajectory for an entire sample may obscure variability in change patterns. Using person-centered approaches, which attempt to classify individuals into groups based on change patterns, scholars identified a *honeymoon-as-ceiling* effect (Proulx et al., 2017). Specifically, most individuals begin marriage relatively satisfied and are able to maintain their satisfaction over time, although they rarely experience increases in satisfaction. Alternatively, those who experience declines in satisfaction over time typically begin their marriage with lower levels of satisfaction. This *honeymoon-as-ceiling* effect not only reflects a shift in what one perceives as the "average" experience for individuals within relationships, but also informs models of relationship change.

In support of the main tenets of the Vulnerability-Stress-Adaptation model (VSA; Karney and Bradbury, 1995), research has found that individuals who begin marriage with relatively lower levels of satisfaction may have difficulty navigating challenges, which perpetuates further relational distress. In contrast, individuals who begin their marriage satisfied may be able to adaptively overcome obstacles within their relationship and sustain high levels of functioning. Based on the VSA model, factors that are associated with how relationships unfold can be categorized into individual, relational, and external domains. Below we present findings on each domain, but recognize that many of these factors have bidirectional associations, serve as moderating and mediating forces to other domains, and do not occur in isolation.

22.3 INDIVIDUAL FACTORS

Individuals with certain traits may be more prone than others to experience and maintain relationships of high quality. This may occur because certain individual attributes are associated with behaviors and cognitions that facilitate a positive, well-functioning relationship. The effects of personal characteristics may also be indirect, in that certain characteristics

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(sometimes also referred to as enduring vulnerabilities; Karney and Bradbury, 1995) can affect how partners respond to stressful events that could impact their relationships, as noted earlier. Individual characteristics may also increase the likelihood of finding and attracting a compatible partner in the mate selection process, which enhances the probability of having a high quality relationship.

Although various demographic characteristics or social categories have been linked to relationship quality, the links are usually indirect, small, or nonexistent (e.g., Joel et al., 2020). For example, in regard to gender, Jackson et al. (2014) conducted a meta-analysis of over 200 samples and found overall that wives were slightly less satisfied than husbands. However, moderation analyses indicated that the gender differences were isolated to the samples of couples obtained from marital therapy and not found in community-based samples. Further, in the dyadic samples obtained for the meta-analysis – where data had been collected from both husbands and wives from the same relationships – no significant gender differences were found. Other research looking at families experiencing economic scarcity, however, has found gender differences, with women reporting lower relationship quality (Blom and Perelli-Harris, 2021; Kanter and Proulx, 2020). Indeed, this variation in gender differences based on type of sample highlights the importance of looking at intersectionality issues, and most notably differences in relationship quality based on membership in more than one social category.

Socio-economic status is another demographic (or social category) variable that has a nuanced association with relationship quality. Lower household income is not consistently associated with less satisfying relationships (Proulx et al., 2017). However, financial strain and other stressors that lower-income couples experience can result in greater turbulence in their relationship and variability in their satisfaction (Blom et al., 2019; Karney and Bradbury, 2020). Many other background variables, including country of origin, age (often confounded with relationship duration), religiosity, and sexual orientation have been examined for their associations with relationship quality, which have been found to be weak (Bühler et al., 2021; Dobrowolska et al., 2020; Joel et al., 2020). We return to a discussion of the role of demographic (social category) variables in explaining variation in relationship quality in a later section when we discuss a contextual perspective.

Individuals also have personality traits, temperament, and psychological orientations that can make them more or less likely to engage in behaviors and cognitions that facilitate optimal relationship functioning. Low self-esteem, low emotional stability, lack of life satisfaction, depression, and anxiety are risk factors for having an initial low degree of relationship quality and also declining relationship quality over time (Joel et al., 2020; Proulx et al., 2017). Personality characteristics, such as those represented in the Big Five, are also associated with the quality of relationships. For example, people who are extraverted, agreeable, and conscientious generally have higher quality relationships, whereas neuroticism is a negative predictor (Schaffhuser et al., 2014). Individuals' attachment styles have also been found to be associated with relationship quality. Attachment anxiety and particularly attachment avoidance are negatively associated with relationship quality, and can moderate the effects of other predictors such as relationship factors, as indicated by several studies including meta-analyses (e.g., Candel and Turliuc, 2019).

Because relationship partners may differ in some of their characteristics (e.g., personality), they also may have different views of their relationship quality. Research has distinguished between actor and partner effects of personal characteristics on each partner's relationship quality (e.g., satisfaction) in dyadic samples. That is, a person's assessment of their relation-

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ship quality may be affected not only by their own characteristics (e.g., level of neuroticism, attachment style) but also by the characteristics of their partner. However, partner effects are found to be weaker than actor effects, especially in established relationships (Back et al., 2022).

Not only may actor and partner effects of personal characteristics contribute to relationship quality, even if only modestly, but so may their interaction or the degree to which partners are similar. The degree to which similarity in characteristics is associated with relationship quality, however, tends to be weak (Joel et al., 2020). On the other hand, the *perception* that one's partner is similar is strongly associated with relationship quality (Montoya et al., 2008), although the causal direction can go either way. Other lines of research also demonstrate the important role of perceptions (more than actual reality) in contributing to relationship quality or satisfaction – such as feeling understood by one's partner (e.g., Hinnekens et al., 2020) and feeling appreciated and supported (Lakey et al., 2016). Other individual factors that can facilitate (or diminish) relationship quality are cognitions, attitudes, and perspectives (for a review, see Fincham et al., 2018).

In sum, several individual attributes and certain cognitions, attitudes, and perspectives are associated with the likelihood of having a high-quality relationship. However, the most significant variation in relationship quality comes from relational factors (Joel et al., 2020), which are discussed next.

22.4 RELATIONAL PROCESSES

It is theorized that factors that influence intimate relationships do so primarily through relational processes (Karney and Bradbury, 1995). Issues surrounding communication, sex, and inequities are common in intimate relationships and tend to differentiate how relationships unfold. Several theoretical models, for instance, center on the quality of communication as the catalyst to enhancement or erosion of relationship quality (Gottman, 1994). Communication has generally been assessed with self-report and observational methods in the context of either resolving a conflict or providing support to a partner. Studies highlight how negative communication (e.g., hostility, defensiveness) is associated with relational distress, whereas positive communication (e.g., support, validation, and responsiveness) is associated with stable, high levels of relationship quality (Proulx et al., 2017). Two meta-analyses found that couples' positive and negative communication behaviors have a small-to-moderate effect on *later* relationship quality in the expected directions (Kanter et al., 2022; Karney and Bradbury, 1995), with many studies focusing on negative communication tactics, relative to positive communication. Although same-gender couples demonstrate more supportive behaviors relative to mixed-gender couples (Ellis and Davis, 2017), on average positive communication tactics are similarly associated with relationship quality across couples (Wang and Umberson, 2023).

Studies that explored how communication and relationship quality change concurrently are less conclusive than the aforementioned findings. For example, two independent studies found inconsistent linkages between changes in communication and changes in relationship quality (Johnson et al., 2021; Lavner et al., 2016). Indeed, in certain instances, relationship quality was a more robust predictor of later communication (than the reverse). These results converge with recent findings that relational factors are a more robust *correlate* of concurrent relationship quality than they are a predictor of *changes* in relationship quality (Joel et al.,

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2020). These inconsistent findings coupled with idiosyncrasies surrounding the impact of communication (for a review, see Bradbury and Lavner, 2012) suggest that other factors may be important for researchers to consider in examining when communication is influential to later relationship quality. The impact of communication, for instance, may depend on other relational factors (e.g., attributions, problem severity, and time spent together; Bradbury and Fincham, 1990; Overall and McNulty, 2017) and the external context surrounding the couple (Nguyen et al., 2017).

Another important relational factor that can influence the overall quality of the relationship is sexual intimacy. Indicators of sexual intimacy are associated with how individuals feel about their overall relationship (Sprecher et al., 2018). Indeed, early in a relationship, sexual conflict (e.g., conflict surrounding the frequency of sexual involvement; attitudes towards sex; and behaviors before, during, and after sexual encounters) is linked with later relationship quality (Long et al., 1996), underlying the importance of sex within the development of intimate relationships. Furthermore, how couples talk about sex is associated with relationship quality and theorized to impact relationships via its impact on sexual satisfaction (Mallory, 2022).

Sexual satisfaction – to a greater degree than sexual frequency – is associated with prospective relationship quality (Hicks et al., 2016; Meltzer et al., 2017). For example, Joel and colleagues (2020) used sophisticated machine learning methodology across 43 datasets and found sexual satisfaction was a key correlate of later relationship quality. Similar to communication quality, however, the association between sexual satisfaction and relationship quality is likely bidirectional (McNulty et al., 2016), especially for younger couples. Although the types of and frequency of sexual activity may differ for couples across the life-course, the importance of sex as a correlate of relationship quality has been observed at all stages of relationships and in both mixed- and same-gender relationships (Diamond, 2015). Sexual dysfunction (e.g., lack of desire, difficulty maintaining sexual arousal) also has been cross-sectionally linked with relationship distress (Hendrickx et al., 2016). These associations, however, may differ depending on the type of sexual dysfunction reported and gender within mixed-gender dyads (see Hendrickx et al., 2019).

Another relationship factor that can affect relationship quality is the degree to which the relationship is perceived to be equitable with a fair and balanced exchange of resources and behaviors. For example, perceptions of being under-benefited (i.e., contributing more than one receives within a relationship) is associated with concurrent and prospective relationship distress (Ogolsky et al., 2017; Sprecher, 2001). These inequities may be especially salient for couples during transitions as couples re-negotiate roles and routines. Generally, these inequities have been most consequential for women in mixed-gender relationships, given patriarchal norms resulting in imbalances in roles and expectations within the relationship. Historically, attention has been paid to equity in the domains of the division of household labor. Although progress has been made in the fair distribution of household labor, women are still disproportionally burdened with more household work relative to men in mixed-gender relationships (Kamp Dush et al., 2018).

Another area in which inequities can arise is in emotion work (i.e., endeavors that promote the individual and relational emotional well-being of a partner; Erickson, 2005). Maintaining intimate relationships takes effort, and in many instances, this emotion work is unevenly distributed, particularly in mixed-gender relationships (Umberson et al., 2015). Emotion work may be an asset to relationships (Horne and Johnson, 2019) until it is perceived as inequitable

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and then becomes a liability, especially for women (Curran et al., 2015; Umberson et al., 2015).

In sum, several relationship variables are associated with the likelihood that partners report their relationship to be high quality. These include the factors discussed above (communication, sexual intimacy, and equity) and many others including spending time together especially in exciting activities, social support, and responsive listening and sharing.

22.5 EXTERNAL CONTEXT

Relationships do not exist in a vacuum. Social networks (Sprecher et al., 2020) and other factors outside of the relationship (e.g., socio-economic contexts, discrimination) can affect relationship quality and functioning. There may also be multiple external contexts – connected to power, privilege, oppression or specific cultural norms – that can simultaneously affect relationships (e.g., defined as intersectionality; for a review see Galovan et al., 2023).

Social networks: The Convoy Model of Social Relations (Kahn and Antonucci, 1980) states that relationships are embedded within social networks (family, friends, and acquaintances) that can either facilitate or inhibit relationships. Social network ties can be a valuable resource and provide various types of social capital and advice to couples (Orbuch et al., 2013). For example, network members can lend and borrow to help each other meet financial obligations. They also can serve as role models for couples, assist with childcare, and give partners a sense of belonging and community. In addition, studies indicate that when social networks approve of and support a relationship, the partners experience greater love, commitment, satisfaction, and relationship quality (Sprecher et al., 2022). Partners who share network members can have enhanced relationship functioning through processes such as interdependence, couple identity, and barriers to ending their relationship (e.g., Sprecher et al., 2022). However, it is also important for couple members to have some separate friends (e.g., Fiori et al., 2018). Furthermore, it is possible for couples to be over-embedded in their networks (e.g., network members have no boundaries and are overly involved in each other's lives), which can lead to assistance that is perceived as interfering, contributing to lower relationship quality.

External contexts: There are many other factors outside of the relationship that can affect relationship quality. General theories of stress argue that these contextual factors (e.g., economic hardship) can serve as sources of stress and affect relationship processes and functioning (for a review, see Karney and Neff, 2013). Neff and Karney (2017) outlined two pathways by which external stress can affect relationships. First, external stress creates additional problems for couples because it reduces opportunities for relationship maintenance activities while concurrently increasing opportunities for conflict. Second, stressful contexts do not allow relationship partners to effectively manage and handle the problems and challenges that arise from these contexts, which leads to lower relationship quality. The stressful context can be experienced by one or both partners and high dyadic coping can protect the couple from the adverse effects of either partner's experienced stress on relationship quality (Bodenmann, 1997).

Numerous external stressors can lower relationship quality and functioning, such as national and local economic hardship and unemployment, neighborhood quality or absence of neighborhood resources (Karney, 2021), discrimination based on race, sexual orientation, or other factors (Jenkins et al., 2020; Totenhagen et al., 2018a), and disadvantaged environments

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(Bryant et al., 2010). Although couples may not differ in levels and slopes of marital quality by income, lower-income couples experience more variability or fluctuations in their marital quality over time (Jackson et al., 2017). Conversely, to the degree that the context surrounding the couple is optimal, couples have a greater chance of having well-functioning, high-quality relationships.

Research indicates that these contextual factors can affect relationships directly (e.g., economic hardship; Blom et al., 2019), or they can moderate the effects of other relational processes (e.g., communication) or individual qualities (e.g., attachment style) on relationship quality (McNulty et al., 2021). In addition, it is important to consider co-occurring stressors or the cumulative risk exposure that couples experience (Rauer et al., 2008), rather than considering only one external stressor at a time. For example, shaped by various systems of oppression, black families face a disproportionate number of adverse social and economic conditions (e.g., poverty, unemployment) compared to white families, which may negatively impact relationship quality (Williams et al., 2019). In a 14-day diary study, within a sample of same-gender couples, Totenhagen et al. (2018a) also discovered that daily external stress was associated with more severe conflict and poorer relationship quality when individuals reported higher levels of internalized homophobia.

In sum, we have outlined several factors outside of the relationship that can affect the quality of a relationship. Although not mentioned in this chapter, several other contextual variables might also be considered, such as chronic illness/health, life course stage, parenthood, and retirement.

22.6 OUTCOMES OF RELATIONSHIP QUALITY

Above we discussed predictors of relationship quality, but there is also an extensive body of literature examining the outcomes of relationship quality. One major outcome of lower relationship quality is further relationship distress and dissolution, although the meta-analytical link between relationship quality and dissolution is not large (Karney and Bradbury, 1995), with some satisfying unions dissolving and some low-quality relationships continuing.

Considerable research also highlights the positive link between relationship quality and the health and well-being of the partners in the relationship (e.g., Robles et al., 2014). Overall, greater relationship quality is related to better health (e.g., objective assessments of function, subjective health assessments, disease severity, and mortality). For example, Robles et al. (2014) showed that supportive, high-quality relationships may buffer stressors, whereas conflict and strain may contribute to the cause and progression of physical disease.

In terms of the outcomes for children, research has primarily focused on how parental divorce affects children (e.g., Amato, 2010). However, studies also indicate that the relationship quality of the parents is positively associated with the quality of children's own future romantic relationships (e.g., Cui and Fincham, 2010; Singh and Thomas, 2022). More specifically, conflict between parents can have adverse effects on relational, emotional, behavioral, and social outcomes for children, whether the parents are still married or not (for review, see Harold and Sellers, 2018).

In sum, research has examined the consequences of relationship quality on the physical and mental health of adult individuals and the well-being of children. Little systematic research has

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been conducted on the effects of relationship quality for others in the social network and the community at large, which presents an opportunity for future research.

22.7 INTERVENTIONS, EDUCATION, AND OTHER WAYS TO MAINTAIN OR ENHANCE RELATIONSHIP QUALITY

Interventions have been developed and evaluated to alleviate and prevent relational distress. Traditional therapeutic interventions (e.g., Behavioral Couple Therapy) demonstrate a positive, short-term effect for many couples (Bradbury and Bodenmann, 2020). Yet, many couples may never seek therapy because of barriers of cost and stigma (Williamson et al., 2019). In response, there has been interest in more preventative, psychoeducational courses to support couples. These programs, primarily labeled as relationship education (RE), emphasize helping couples communicate more effectively (Bradbury and Bodenmann, 2020), with randomized controlled trial (RCT) evaluations demonstrating small positive impacts on relationship quality (Johnson and Bradbury, 2015). However, these effects tend to wane over time and are less effective for families dealing with substantial economic scarcity (Johnson and Bradbury, 2015).

As a result, clinicians have implemented more tailored programs, emphasizing specific needs of couples, while using innovative delivery methods to reach couples. For example, using RCT designs, home-based delivery programs helping African American couples navigate stressors (Barton et al., 2017) and online programs assisting couples in understanding specific points of tension in their relationship (Doss et al., 2016) have been found to improve relationship functioning. Others have investigated how alleviating contextual stressors (e.g., assisting in securing stable employment) may improve relationship functioning (Lavner et al., 2015). Indeed, broader interventions that do not involve an investment of time for families can have a positive impact on family functioning (e.g., raising the minimum wage and child tax credit; Karney et al., 2022). For example, work–family policies, such as paternity leave, may indirectly improve romantic relationships by decreasing inequities in parenting responsibilities between partners (e.g., Petts and Knoester, 2019). Broader policies (e.g., federal marriage recognition in the US) may also decrease sociopolitical uncertainty for couples experiencing marginalization, which in turn, may positively influence family well-being (Monk and Ogolsky, 2019; Ogolsky et al., 2019). As the field advances, it will be critical for these two parallel paths to converge with even broader advocacy to reduce inequities that put undue stress on historically marginalized families.

22.8 FUTURE DIRECTIONS

Since Karney and Bradbury's (1995) seminal meta-analysis illustrating various factors that influence the longitudinal course of marriage, there has been an influx of studies examining how and why relationship quality unfolds. As the field advances, it will be critical to more precisely link factors with specific types of change. Different foci of change (e.g., linear change versus fluctuation) are important to examine together, as correlates and consequences of these dynamics may be distinct (e.g., Jackson et al., 2017). Further, when studying how relationship quality unfolds, it will be essential to understand how intervals of assessment (e.g., daily,

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weekly, monthly, yearly) influence inferences drawn from longitudinal studies. These future directions ought to be undertaken with an emphasis on dyadic patterns. Including both partners can highlight actor and partner effects, while also illustrating the potential consequences of discrepancies in relationship quality between partners (e.g., Kanter and Proulx, 2021).

With large samples, sophisticated analyses, and team science approaches (e.g., Joel et al., 2020), the field has recently identified a comprehensive list of factors that impact how relationship quality changes over time. However, these factors do not occur in isolation. As noted by early theorists in the field (e.g., Bronfenbrenner, 1979), various systems interact to influence couple well-being simultaneously. An enhanced emphasis on context is critical to understand more fully when specific factors influence relationships. More important than merely recognizing the ways in which context influences various correlates of change, it will be imperative to identify *why* and *how* these contexts influence relationships to inform future theory and practice. In addressing these questions, relationship science can better understand how inequities and privileges are maintained within dyads and transmitted across generations.

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PART VI

PARTNERSHIPS WITHIN SOCIETIES

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23. Social stratification and partnerships

Diederik Boertien

Even though partnering appears to be quite a personal event, it is shaped by factors that operate at a more structural level. Whom we meet in life, whether we would like to be single, to cohabit or to marry, and how likely we are to stay together with our partners are all processes shaped by factors such as socioeconomic status, ethnicity, gender and sexuality. For instance, higher educated persons tend to partner with other higher educated persons and women are less likely to find a new partner after separation than men. Why is this the case? A short answer is that partnering is not a random event but socially stratified: a result of the wider social inequalities in society and the structures that shape them.

In this chapter, we first aim to understand how social stratification shapes the partner choices individuals make. Why do we not have the same chances of finding a wealthy partner? Why are certain people more likely to separate? Second, we flip things around and aim to understand how partner choices affect social stratification. How does partnering matter for our socioeconomic status and well-being? Does partnering behavior contribute to economic inequality? We focus primarily on the socioeconomic stratification of partnering in high-income countries, and discuss possible intersections with other characteristics in the discussion.

23.1 HOW SOCIAL STRATIFICATION SHAPES PARTNERING

Social stratification shapes the partnering trajectories people embark upon as well as who they partner with. With partnering trajectories, we mean whether, when, and how often people partner and whether they decide to live apart, cohabit or marry. We discuss both partnering trajectories and partner choices in turn.

23.1.1 Partnering Trajectories: Singlehood, Partnering, Separation, and Re-Partnering

Partnering trajectories differ by characteristics such as ethnicity, gender, sexuality and socioeconomic status. For instance, we know that lower educated men are more likely to remain single and to separate as compared to higher educated men (Blossfeld and Timm, 2003; Lyngstad and Jalovaara, 2010). That certain people are more likely to experience specific partnering events is not of concern per se if they are the result of preferences. However, if group differences are the result of constraints we should be concerned, as this creates a situation where the opportunities to pursue the lives we desire are unequally distributed.

Determining whether differences in partnering trajectories reflect unequal opportunities is a complicated task. In some cases, opportunities are explicitly restricted. For instance, large parts of the LGBTQ population are still legally excluded from marriage in many countries. In other cases, constraints are not easily identified as they can take the shape of processes that are not straightforwardly measured such as normative pressures. Asking the "why?" ques-

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tion therewith becomes very important when studying the social stratification of partnering trajectories.

The complicated relationship between constraints and preferences is illustrated well by how the likelihood of having a partner differs by education and gender. For men, studies generally show that resources such as education, income or wealth increase the likelihood of having a partner. For women, education reduces the likelihood of having a partner in certain countries such as Southern Europe, but in other countries the relationship between education and having a partner is positive, such as in Northern Europe and the United States (Van Bavel et al., 2018).

Why do we observe these differences for women across contexts? Several scholars have argued that this relates to changes in gender egalitarianism over time (Van Bavel et al., 2018; Zentner and Mitura, 2012). In traditional contexts, gender norms shape preferences for unions where men are higher educated or have more resources than women (Bertrand et al., 2015; Esteve et al., 2016). In contexts where more gender egalitarian men are available and where a gendered division of labor is less normative, preferences for unions where men are more resourceful could decline (Zentner and Mitura, 2012).

Once partnered, socioeconomic status is related to the form couples give to their relationship too. Most attention has gone out to differences between marriage and cohabitation. Some studies have looked at the stratification of less common relationship arrangements. For instance, non-residential relationships and polyamory appear to be more common in higher socioeconomic strata in high-income countries (Liefbroer et al., 2015; Sheff and Smith, 2022).

In contexts where marriage is still widespread and normative like the United States, cohabitation is often concentrated among the socioeconomically disadvantaged. Rich and educated individuals do cohabit but generally transit to marriage relatively quickly (Heuveline and Timberlake, 2004). Several scholars have pointed at the so-called "marriage bar" as an explanation for the positive socioeconomic gradient in marriage in the United States (Gibson-Davis et al., 2005). Given the strong norms related to marriage, individuals want certain conditions to be met before marrying, for instance, a stable job and income. In other countries where marriage is less normative and marriage bars appear less related to economic resources (Perelli-Harris et al., 2014) the socioeconomic correlates of union type tend to be weaker (Perelli-Harris and Lyons-Amos, 2016).

Another illustration of how the relationship between socioeconomic resources and partnering behavior depends on context is the changing educational gradient in divorce and separation. Research on this topic goes back decades to when sociologist Goode (1963) predicted that when divorce is uncommon, the economic, legal and social costs related to divorce are high. In such contexts, only those with high socioeconomic resources can overcome these barriers to divorce. When divorce becomes more common, the barriers to divorce become lower and divorce spreads also among those with fewer resources. Due to the higher stress individuals with few resources experience and the pressure this puts on relationships (Conger and Conger, 2002), the correlation between socioeconomic status and divorce is likely to be negative in contexts with low barriers to divorce. A large body of research has indeed shown that education is one of the very few correlates of divorce that changed over time. The correlation between education and divorce has become less positive in Southern and Eastern Europe and has reversed from positive to negative in Nordic countries and the US (Härkönen and Dronkers, 2006; Matysiak et al., 2014), even though the exact reasons why this happened have been subject to debate (Hogendoorn et al., 2022).

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The reversal in the correlation between education and divorce is especially applicable to women, whereas men's education has been negatively related to divorce for longer (Lyngstad and Jalovaara, 2010). This shows that the barriers and opportunities to leave a partner are gendered. Sociologist Oppenheimer's (1997) work on gender, employment and divorce helps us to understand this further. In contexts where women have few economic opportunities, only women with very high economic resources can "afford" to leave their partner. However, when both men and women contribute to household income, men become more dependent on women's income in different-sex relationships.

Finally, the socioeconomic stratification of further events within individuals' partnering trajectories is less often studied. Evidence regarding re-partnering after separation differs across studies and countries. For instance, a study on Norway found that higher educated individuals re-partner more (Wiik and Dommermuth, 2014), whereas a study on Britain found an opposite relationship (Bukodi, 2012).

23.1.2 Homogamy within Relationships

Among all partnering-related topics there is probably one that has been most central to quantitative social stratification research: partner choice. Partnerships are an important element in many people's lives. It is therefore assumed that the partners we choose tell a lot about the kind of people we can and want to interact with. Therefore, the likelihood to partner with someone from a different socioeconomic group or ethnicity is often used as an indicator of how high social barriers are between groups in society (Hout, 1982; Ultee and Luijkx, 1990). Levels of socioeconomic homogamy in society, the extent to which individuals select partners with the same socioeconomic status, is regarded to be an indicator of the "openness of society", similar to indicators of intergenerational social mobility (Smits et al., 1998). Several studies have shown that, on the macro-level, both indicators are strongly related: the higher the social mobility, the lower is homogamy based on characteristics like education within relationships (Katrňák et al., 2012; Ultee and Luijkx, 1990).

Despite the saying "opposites attract", studies come to the unequivocal conclusion that people tend to partner with those who are similar to themselves (Schwartz, 2013). One reason for this regularity is that having similar characteristics can make it easier to share a household and plan a future together (DiMaggio and Mohr, 1985; Oppenheimer, 1997). However, another major reason for homogamy is the unequal opportunities we have to meet people who are different from ourselves (Kalmijn, 1998). Segregation in neighborhoods, schools, workplaces and social events makes it harder to meet people with different income or education.

Trends in educational homogamy have been used to get an indication of the extent to which the distance between socioeconomic groups in society is increasing or decreasing over time. There are a variety of methods available to calculate the strength of educational homogamy net of changes in the distribution of education in society, and these do not always come to the same conclusion. For instance, several studies have argued that educational homogamy has increased over time in the United States whereas others argue the opposite (Kalmijn, 1991; Rosenfeld, 2008; Schwartz and Mare, 2005). This variation depends on how changes in levels of educational attainment are accounted for, and also on the relatively minor nature of changes in homogamy over time (Rosenfeld, 2008). In Europe, trends are mixed too, but a recent comprehensive study showed that educational homogamy has probably decreased across European countries over the last decades (De Hauw et al., 2017).

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The drivers behind decreasing homogamy are less studied, but an important strand of research has looked at differences by gender. Relationships where men are lower educated than their partner or have less income used to be relatively uncommon. As women's employment and income have increased in society, the social acceptance of relationships where women earn more or are higher educated than their partners might have gone up, increasing the possibility of forming unions across educational categories (Bertrand et al., 2015; Esteve et al., 2016; Van Bavel et al., 2018).

Another important change is the increase in online dating, which has become one of the primary ways in which partners meet (Rosenfeld and Thomas, 2012). A lively debate exists about the extent to which online dating has reduced or increased homogamy (Potarca, 2017). On the one hand, the internet reduces some physical barriers toward meeting people who are different. On the other hand, the increase in the number of people that can be reached through online contact, combined with the possibility to use filters can also allow individuals to look for people who exactly fit their preferences. If these preferences are homogamy, as many studies argue (Skopek et al., 2011), it is unclear whether the increasing possibilities to meet different people that online dating offers will lead to a more open society in terms of partnering.

A final question is the extent to which decreasing educational homogamy reflects a trend towards more open societies. It is possible that the relevance of education as a socioeconomic marker is declining. For instance, studies on income inequality have shown how income has increased primarily within rather than between educational groups (Western et al., 2008). Other socioeconomic markers could have become more relevant, such as income or wealth. This reveals an issue related to studying homogamy based on characteristics like education, which are often used as proxies of socioeconomic status but also capture a large variety of other unobserved characteristics. Whether educational homogamy reflects an effect of education, an underlying concept of socioeconomic status, or other characteristics (e.g. psychological traits) on partnering is therefore not always clear. In this regard, studying characteristics that are more or less fixed at birth can be more fruitful to understand unequal opportunities in partnering. Future research on homogamy based on characteristics like social origin could help better understand whether the opportunities to meet resourceful people have become more equal over time.

23.2 HOW PARTNERING CONTRIBUTES TO SOCIAL INEQUALITIES

So far, we have talked about the socioeconomic stratification of partnering trajectories. However, partnering trajectories themselves also stratify society. For instance, many institutions in society are constructed around the partnering trajectories that the majority of the population follow. Examples are tax benefits related to marriage, or housing for couples and families rather than single persons. In this section of the chapter, we will focus on the socioeconomic benefits and costs of following certain partnering trajectories. We first discuss how partnering relates to individual income and economic inequality; subsequently we discuss partnering's contributions to inequality of opportunity.

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23.2.1 Partnering and Economic Well-Being

Partnered people generally have higher economic well-being than unpartnered people (Lersch, 2017). This could be the result of what has been reviewed in the first section of this chapter: economic resources increase the likelihood of finding a partner. However, there are also other reasons to expect partnered people to have higher economic well-being than unpartnered people. One reason derives from the economic benefit related to co-residential relationships such as splitting housing costs and pooling resources like wealth (Lersch, 2017). In addition, partners can provide emotional support and access to social networks, both of which can make it easier to find a good job and to perform well at work (Bernardi, 1999). However, there are also benefits related to having a partner that derive from the way society perceives partnered persons (Pirani and Vignoli, 2016). For instance, having a partner could be perceived positively by employers (Killewald and Gough, 2013).

Several of these benefits related to having a partner are applicable regardless of relationship form, but some might be more applicable to normative relationship forms than to others. For instance, a large body of research on different-sex couples has shown the existence of a marriage premium: married people have higher earnings and wealth than unmarried people (Killewald and Gough, 2013; Lersch, 2017). This might be because married people are more economically selected, but also because the normative status of marriage increases the social benefits related to this relationship form (Torche and Abufhele, 2021). The role of norms is further illustrated by the observation that the marriage premium seems to apply more to men than to women (Budig and Lim, 2016), even though this premium might be applicable only to parents (Killewald and Gough, 2013). Gendered norms within marriages are connected with prioritizing men's over women's careers, and marriage might not be perceived equally by employers as a signal of commitment to a job for women as for men.

Even though men seem to benefit more from entering relationships than women, we also observe that men lose less when leaving a relationship than women (DiPrete and McManus, 2000). Men's earnings normally grow within relationships whereas women's earnings do so less often, therefore men often lose less when their partner leaves than women (Boertien and Lersch, 2021). In addition, after couples with children split up, children often co-reside with their mother, which poses obstacles to having a job and a career, which compromises women's economic well-being after separation further (Van Damme et al., 2009).

In short, partnering is an event that is related to economic benefits, especially for men. This has consequences for how we think about the importance of socioeconomic stratification in partnering trajectories. Even if the socioeconomic differences in partnering trajectories are driven by preferences, they will matter for social stratification because they shape economic well-being.

23.2.2 Partnering and Economic Inequality

Several studies have aimed to directly quantify how partnering behavior relates to economic inequality. The argument these studies scrutinize is intuitive: if two rich persons form a couple and two poor persons form a couple, we get one rich couple and one poor couple. If each rich person partners a poor person, we get two couples with similar income. In other words, partnering is a powerful route through which income can be redistributed across households, but it can also strengthen existing inequalities further. Most studies on this topic can be divided

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into those that looked at partner similarity based on education, and those that looked at partner similarity based on earnings or income. We discuss both in turn.

A pioneering set of studies investigated to what extent changes in educational homogamy contributed to earnings and income inequality between households (Breen and Salazar, 2011). Because education is a strong predictor of earnings, increases in educational homogamy would imply an increasing concentration of income within households. But these studies conclude that the impact of changes in educational homogamy on earnings and income inequality has been negligible (Boertien and Permanyer, 2019; Breen and Salazar, 2011). This does not imply that educational homogamy is not important for economic inequality. Simulating major hypothetical changes in educational homogamy does lead to important variations in economic inequality. However, changes in educational homogamy across high-income countries have simply been too minor to have a major impact on economic inequality (Boertien and Permanyer, 2019; Breen and Salazar, 2011). Some studies adopted a broader conception of educational homogamy that included also the question of who remains single. These studies find more noticeable effects on economic inequality, suggesting that changes in who has a partner might be more relevant for inequality than changes in who people partner with (Erola and Kilpi-Jakonen, 2022).

Studies on partner similarity in earnings are not as easy to summarize. One complication here is that earnings is a characteristic that changes much more over time than education. In the case of education, we can assume that an individual's education was similar at the time of observation as compared to the time of union formation. Earnings might have changed considerably years after a partnership is formed (Gonalons-Pons and Schwartz, 2017). In other words, educational homogamy among currently partnered individuals is likely to be mostly the result of partner selection (and separation), but earnings homogamy among currently partnered individuals is the result of many more processes, including the way in which couples divide paid and unpaid work after moving in together and having children. To underline that we do not just talk about partnering, we use the term "earnings similarity" rather than "earnings homogamy" here.

Earnings similarity has gone up over the last decades: individuals with high earnings are more likely to have a high-earning partner today (Nieuwenhuis et al., 2017). Combining this observation with the logic that high levels of homogamy lead to more inequality would suggest that increasing earnings similarity has driven up inequality (Esping-Andersen, 2007). However, recent studies argue that this is probably not as much the case as often assumed (Boertien and Bouchet-Valat, 2022). Increasing earnings similarity between partners seems to be primarily the result of changes in employment rates among women, rather than changes in partner selection (Gonalons-Pons and Schwartz, 2017).

Increasing female employment rates indeed mean that many "power couples" are formed with two high-earning partners. However, they also mean that low-earning men now often have a partner with earnings, decreasing the share of households with low income. In addition, vulnerable groups of single women, such as single mothers, benefit from increases in women's earnings. Once considering the additional equalizing effects that increases in female employment rates have (Bouchet-Valat, 2017), the overall impact of increasing earnings similarity is non-existent in many countries, and more moderate in other countries, primarily those where female employment rates were high already, such as Sweden, Norway and the UK (Boertien and Bouchet-Valat, 2022; Schwartz, 2010).

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In short, empirical support for the argument that changes in partner selection have contributed to economic inequality is not unequivocally strong, but it is clear that partner selection is important for inequality at any given point in time (i.e. cross-sectionally).

23.2.3 Partnering and Inequality of Opportunity

If parents' economic resources matter for children's opportunities in life, partnering trajectories of parents can be a factor affecting inequality of opportunity. This idea was part of the influential "diverging destinies" thesis, that several developments related to demographic change have contributed to a polarization of socioeconomic resources available to children (McLanahan, 2004). One of these developments is the increase in single motherhood, especially among lower educated women, observed across a variety of high-income countries. Growing up in a single-parent family is negatively related to a wide range of outcomes including psychological well-being, educational attainment and wealth (Amato, 2010; McLanahan et al., 2013). Hence, if single parenthood is increasing particularly among already disadvantaged groups, this trend will contribute to a further polarization of opportunities for children.

The different components of this argument have received considerable empirical support. A large variety of studies have confirmed both the increase in single parenthood among socioeconomically disadvantaged groups across countries (Härkönen, 2017; McLanahan and Jacobsen, 2015) and the association of single parenthood with opportunities in life for children (Amato, 2010; McLanahan et al., 2013). Changes in family structures have been central to various accounts of increasing social inequalities (Cherlin, 2014; Putnam, 2016). At the same time, there are also several counterarguments that can be made.

First of all, this argument only holds if the effects of single parenthood on children's opportunities are causal. Single parenthood can affect children's outcomes because single parents have fewer adults contributing to household income and less overall time available to invest in children (Thomson et al., 1994). In addition, single parenthood often follows a separation between parents, a situation to which children have to adjust emotionally (Cherlin, 1999). However, the association between single parenthood and children's opportunities can also exist exactly because socioeconomically disadvantaged parents are more likely to be single. In that case, the relationship between childhood family structure and child outcomes could be spurious. Even though estimating the causal effect of childhood family structure is unlikely to be possible, many studies have aimed to account for various sources of endogeneity (McLanahan et al., 2013). Relationships of childhood family structure with cognitive ability often become smaller, whereas its association with educational attainment often persists once accounting for sources of endogeneity.

Secondly, this argument might not hold if there exists heterogeneity in the way childhood family structure relates to outcomes in life. On the one hand, children with resourceful parents might be affected less by whom they live with as parents' resources can help compensate for the lower levels of time spent with one parent or the adjustment to an eventual separation that preceded entrance into single parenthood of the parents (Bernardi and Radl, 2014; Grätz, 2015). On the other hand, children with resourceful parents also have more to lose from not co-residing with one parent as those resources might be less readily accessible to children as compared to a situation where they live with both parents (Bernardi and Boertien, 2016). Which of these scenarios holds depends on the outcome and context studied (Bernardi and Radl, 2014; Grätz, 2015; Martin, 2012).

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Taken together, the extent to which trends in single parenthood matter for inequality of opportunity will depend on how stratified single parenthood is, how strong the causal effects of single parenthood are, and whether these effects differ by socioeconomic status. A handful of studies have aimed to quantify the overall possible contribution of changes in family structure to inequality of opportunity. These studies in general conclude that changes in family structure contributed, at best, moderately to greater differences in the opportunity to gain educational degrees between children from lower and higher socioeconomic backgrounds (Alamillo, 2016; Bernardi and Boertien, 2017; Bloome, 2017).

Hence, it is unclear to what extent trends in partnering dynamics among parents contribute to inequality of opportunity. However, the observation that childhood family structure matters for children's outcomes in life does, by itself, form a source of inequality of opportunity. The question arises as to how society can be organized in such a way that opportunities do not depend on partnering dynamics of parents.

23.3 DISCUSSION

Research on partnering is relevant from an inequality perspective for at least two reasons. First, having the freedom to follow any partnering trajectory one desires can be an important goal for societies. Secondly, partnering itself is part of social stratification systems as they affect the resources of individuals and their families. Even though evidence that chances in partnering increase inequalities is limited, there is strong evidence that partnering dynamics are socially stratified and related to well-being on the individual level. This observation raises some questions about its impact on inequality too, which will be discussed in the final section of this chapter consisting of suggestions for future research.

First, a relevant question is to what extent individuals experience the freedom to follow the partnering trajectories they desire in today's societies. That partnering trajectories are socially stratified suggests that this is not the case. Research that aims to understand under what conditions partnering trajectories become more equally accessible to individuals in society would be a valuable contribution to inequality research. A nice example of research that has aimed to understand how normativity relates to social stratification is the study by Torche and Abufhele (2021). They showed that the marriage premium for children's health depends on how normative marriage is in Chile.

Secondly, much research has focused on the benefits that normative partnering trajectories such as lifelong marriage provide to individuals and their children. However, a focus on the obstacles towards following non-normative partnering trajectories could receive more attention. In this regard, attention to the partnering trajectories of oppressed groups might be particularly valuable. We primarily focused on how partnering relates to socioeconomic stratification. However, norms about partnering generally reflect the trajectories that are followed by, and benefit, cisgender, heterosexual, White and male individuals. For instance, individuals identifying as LGBTQ* and ethnic minorities are still or have historically been excluded from the institution of marriage in many contexts. Partnering is therefore likely to be an important factor contributing to economic differences, as well as social stratification more generally, by ethnicity, gender and sexuality (Cross et al., 2022; Reczek, 2020; Williams and Baker, 2021). A future research agenda that focuses on these intersections is likely to bring us closer to ideas about how a society can be constructed where diverse partnering trajectories are accessible

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to everyone and choices regarding partnering become less consequential for an individual's socioeconomic fate.

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24. The economy and partnerships

Daniele Vignoli and Raffaele Guetto

This chapter addresses the complex interplay between the economy and partnership formation (cohabitation, marriage), focusing on heterosexual unions in wealthy nations, most specifically Australia, Europe, and the US, from the 1960s onwards, with a special focus on the last decades. The role of the economy is examined by addressing the central importance of economic uncertainty in contemporary societies (i.e. the lack of clarity regarding future economic prospects). Economic uncertainty may be interpreted as a micro-level phenomenon mainly related to the labor market (e.g. Kreyenfeld et al., 2012; Mills and Blossfeld, 2013), but it may also be conceptualized as a macro-level phenomenon, reflecting the general uncertainty felt by people in times of economic turbulence (Sobotka et al., 2011). Growing uncertainty, a defining feature of the "globalized" society (Blossfeld et al., 2006; Blossfeld and Hofmeister, 2006), permeates contemporary household life and potentially affects partnerships (Mills and Blossfeld, 2013).

The *objective side* of economic uncertainty is viewed as a personal risk factor that is predominantly correlated with negative labor market situations, such as job instability and short-term contractual arrangements. In the United States, quantitative research in demography, sociology, and economics has typically shown that (stable) marriage is associated with favorable economic conditions (Carlson et al., 2004; McLaughlin and Lichter, 1997; Smock et al., 1999; Sweeney, 2002). In Europe, the work by Kohler and colleagues (2002), and the large multi-nation project by Blossfeld and his collaborators (Blossfeld et al., 2006; Blossfeld and Hofmeister, 2006; Mills and Blossfeld, 2013), initiated the literature on economic uncertainty and family formation. According to these authors, difficulties in finding stable employment due to macroeconomic volatility cause individual-level economic uncertainty and generates a delay in family formation in favor of a protracted stay in the parental home.

In this chapter, we argue for the need to transcend our field's conventional frameworks, moving beyond a mere focus on objective economic variables to also consider subjective assessments and future narratives. Regardless of an individual's unique economic situation, in fact, subjective appraisals of economic conditions, such as employment (in)security and employment expectations, may also have an impact on union formation. The *subjective side* of economic uncertainty is discussed, recognizing that in a context in which considerations concerning partnership decision-making are obfuscated by mounting uncertainty, individuals increasingly rely not only on the present and past experiences (the "shadow of the past") but also on their *narratives of the future*, which reflect contingent plans for reaching certain goals in life.

24.1 HISTORICAL AND THEORETICAL STANDPOINTS

Family researchers have reached a general consensus that precarious economic circumstances motivate individuals to delay family formation (e.g., Rindfuss et al., 1988). Malthus is widely

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credited with being the first to formulate a theoretical foundation for this presumption. Malthus' studies were guided by the moral conviction that individuals should reduce their fertility under difficult economic circumstances (Mombert, 1907, p. 86, cited in Kreyenfeld, 2015). This idea was mirrored in societal conventions and governing laws that oversaw marriage and, implicitly, reproductive activity, for a significant portion of northwest European history (Friedlander, 1992, p. 28, cited in Kreyenfeld, 2015). For instance, in German-speaking areas prior to the turn of the twentieth century, couples who wanted to get married were required to ask the government for permission, and their application for a marriage license could be rejected if they were unable to prove that they were in a stable financial position (Knodel, 1967). During this era, economic stability was perceived to entail having the means to support a family without the requirement for government aid. While these rules governing marriage progressively weakened over time, the belief that a stable financial status was necessary for a couple to start a family lingered.

Many subsequent theoretical ideas were founded on the idea that family formation required financial stability. These micro-level interpretations are centered on psychosocial and economic factors that affect how individuals decide whether, and when, to enter a marriage. Discussions related to marriage frequently focused on economic issues that were formalized in economic family models (England and Farkas, 1986). Most prominently, Becker's (1981) New Home Economics (hereinafter NHE) approach continues to have a significant impact on contemporary research on partnership formation. The NHE assumes a gendered division of labor within the couple, in which women tend to "specialize" in domestic and care activities and men in paid work. This implies that women's education and employment increase the opportunity cost of partnerships (*substitution effect*), whereas men's higher earning potential is associated with a higher propensity to form a family and have children (*income effect*). Economic views on marriage have permeated the social sciences and remained central to the theory and empirical applications for many years.

The correlation between economic circumstances and family dynamics has attracted renewed attention in the twenty-first century due to a new and pervasive economic unpredictability. Patterns of union formation highlight responses to factors including rapid globalization, accelerating economic restructuring (such as the rise of the gig economy and the decline of steady jobs), and widening income gaps (Sassler and Lichter, 2020). According to the globalization and labor market deregulation standpoint (Blossfeld and Hofmeister, 2006; Mills and Blossfeld, 2013), it is reasonable to assume that people will put off getting married, a resource-intensive and lifelong commitment, when they are experiencing economic uncertainty. Additionally, the growth of employment insecurity puts financial resources in jeopardy and may prevent people from getting married or accumulating the funds to have a wedding ceremony (Vignoli and Salvini, 2014). This is consistent with ongoing research findings, which demonstrate that people avoid getting married because they don't meet the "economic bar" set by society. For example, according to Gibson-Davis et al. (2018), achieving financial stability increases the chances people in the US will marry.

From a gender lens, the work by the American demographer and sociologist Valerie Oppenheimer gave impulse to several empirical applications. She published a number of significant studies that focused on the correlation between men's socioeconomic status and the propensity to progressively delay and even forsake marriage (Oppenheimer, 1988; 2000; 2003; Oppenheimer et al., 1997). Since starting and keeping a family is undoubtedly a financial drain, the traditional *male-breadwinner hypothesis* postulates that men are viewed

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as less desirable spouses when they do not demonstrate the ability to fulfill the role of being the main source of financial income. This explanation echoes Parsons (1949), in that more symmetrical economic roles of men and women would undermine marital solidarity. The *uncertainty hypothesis*, elaborated by Oppenheimer, adds the perspective that uncertainty is embodied by (particularly men's) unsteady employment careers, as shown by low-status positions, unemployment, and irregular or transitory types of work. The husband's ability to provide for the family in the future is directly associated with his employment situation. Thus, employment-related uncertainties would be associated with marriage postponement.

In addition to the theoretical perspectives mentioned above, another viewpoint needs to be acknowledged. According to Friedman and colleagues' (1994) socio-psychological uncertainty reduction theory, the marriage decision may also be a "tactic" to reduce biographical ambiguity. According to this perspective, reducing uncertainty is an inherent value, and rational actors will constantly aspire to do so. Consequently, women may choose the "alternative career" of being wives in order to establish an otherwise uncertain life track in response to poor economic prospects.

In recent years, marriage appears to be losing its centrality in the majority of middle–high income countries, and cohabitation has become a common life course event. The Second Demographic Transition is arguably the most well-known theoretical paradigm for the investigation of "new" family arrangements (hereinafter SDT; see Lesthaeghe, 2020). By highlighting the emergence of post-materialist values and secularization, the SDT explains the increase in cohabitation and decrease in marriage through ideational changes. Nevertheless, the SDT does not acknowledge the increase in (economic) uncertainty in the discourse around marriage and cohabitation prevalence. In contrast, the "Pattern of Disadvantage" (hereafter POD) narrative contends that socioeconomically disadvantaged populations may choose cohabitation over marriage during times of economic turmoil because it is transient and easier to terminate (Perelli-Harris and Gerber, 2011; Perelli-Harris et al., 2010). Following the uncertainty reduction theory, entering a partnership may represent a way to alleviate the uncertainty of one's life trajectory; however, in this situation, cohabitation may be favored as a less binding form of union (Mills and Blossfeld, 2013). Marriage is not always rejected, but people may choose to put off getting married until their future economic prospects are more certain, and they have secured their financial situation. In fact, empirical evidence shows that most people in Europe and the US cohabit at the start of a relationship, and generally, those who are more economically stable progress into marriage (for a discussion, see Perelli-Harris and Blom, 2021). Couples may choose to postpone or forgo marriage in favor of cohabitation as a result of the decline in men's career prospects, which creates a natural crisis of the male-breadwinner paradigm, particularly in more male-breadwinner-oriented nations (Oppenheimer et al., 1997; Oppenheimer, 2003). However, in countries heading toward the "dual breadwinner–dual carer" model, women's employment situation is likely to gain importance.

24.2 THE OBJECTIVE SIDE OF ECONOMIC UNCERTAINTY: LABOR MARKET CIRCUMSTANCES

Family formation may be hampered or delayed by the objective side of economic uncertainty, that is, employment instability associated with unemployment and/or temporary employment. The labor markets in industrialized economies underwent significant deregulation and seg-

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mentation during the 1980s, which significantly shifted how labor markets operate. Modern societies are experiencing an unprecedented level of structural uncertainty because of deregulation and other features of globalization, such as liberalization and privatization (Mills and Blossfeld, 2013). People, and especially young labor market entrants, are increasingly being forced to accept insecure, fixed-term contracts, and to experience periods of unemployment. Employment instability is directly linked with economic uncertainty (Scherer, 2009; Standing, 2011) and might deter young adults from engaging in long-term relationships and compel them to put off leaving the family home to set up their own households (Billari, 2005).

Studies conducted in the American context have found that the postponement of union formation is often linked to weak economic conditions (Sassler and Leichter, 2020). Recent studies in the United States now study wealth and other assets—e.g., savings, home property—or debts, because they reflect the regularity and stability of work and wages, hence influencing people's decisions to marry (Ishizuka, 2018; Schneider, 2011; Vespa and Painter, 2011; Bukodi, 2012). In Europe, a number of studies have found that having a fixed-term contract or a temporary job greatly lowers the chances of an individual forming a marriage whereas cohabitation permits the postponement of long-term commitments, especially in historical periods of economic uncertainty and rising unemployment (Mills and Blossfeld, 2013). Australian studies corroborate the view that people with unstable job situations, particularly unemployed males and/or those with lower levels of education, are more likely to delay union formation (e.g., Evans, 2015; Heard, 2011). A mixed-method study for Italy supports the idea that cohabitation—in contrast to marriage—is more compatible with the employment uncertainties of today's labor market (Vignoli et al., 2016). Individuals faced with uncertain prospects prefer cohabitation to marriage in light of its more uncertain nature. Alternatively, they might decide to postpone marriage until their life prospects become clearer. Since the Great Recession—namely, the 2008–2013 economic downturn—there has been an increase in academic interest in the effects of economic uncertainty on partnership formation (Cherlin et al., 2013; Schneider and Hastings, 2015). During this time, the distinction between marriage and cohabitation may have widened. Marriage costs money and is becoming increasingly expensive, possibly even a luxury (Wilcox et al., 2015). Cohabitation is, nevertheless, able to offer a temporary setup.

The level of income might act as a crucial channel through which time-limited work arrangements affect union formation. Consistent earnings are indeed typically regarded as a crucial prerequisite for starting a family (Kohler et al., 2002). Recent research involving Dutch workers employing a large-scale survey linked to register data demonstrated that low-income levels explain the negative correlation between time-limited employment and marriage (Van Wijk et al., 2021). Another study for Australia, on the other hand, found that temporary work arrangements had negative effects on union formation that persisted after controlling for income, indicating that time-limited work arrangements embody more than a mere lack of income (Bolano and Vignoli, 2021), as will be discussed in the next section.

Men and women are affected by objective economic insecurity in different ways. Numerous scholars have examined Oppenheimer's theory within the US context, and the results largely reinforce the idea that men's poor economic prospects are linked to a tendency to postpone marriage (Clarkberg, 1999; Lichter et al., 1992; Oppenheimer, 2003; Oppenheimer et al., 1997; Sassler and Schoen, 1999; Smock and Manning, 1997; Sweeney, 2002; Xie et al., 2003). In a number of different contexts, including Italy (Vignoli et al., 2016), the Netherlands (De Lange et al., 2014), and a sample of eight European countries (Wolbers, 2007), the detrimental

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impacts of temporary work arrangements on marriage are particularly evident among male populations. The literature on women's marriage rates shows mixed results, with studies conducted in Italy (Vignoli et al., 2016) and a sample of eight European countries (Wolbers, 2007) reporting negative effects, while those performed in Germany (Kurz et al., 2005) and the Netherlands (De Lange et al., 2014) reported no effect. Both the *male-breadwinner hypothesis* and Oppenheimer's *uncertainty hypothesis* received considerable support from Kalmijn (2011) in his thorough comparative piece. The degree of gender equality in a society moderates the relative importance of these hypotheses. When men are the major breadwinners and females are the primary carers, the household's financial health is more strongly reliant on the male's earnings potential. Hence, men's economic position would be less influential in more gender-equal countries because the costs of setting up a household are more often shared between men and women. Among the younger cohorts, women's employment stability has been found to encourage union formation and marriage decisions also in traditionally male-breadwinner Southern European countries (Domínguez-Folgueras and Castro-Martín, 2008; Vignoli et al., 2016).

24.3 THE SUBJECTIVE SIDE OF ECONOMIC UNCERTAINTY: THE SPECTER OF THE FUTURE

The research examples that have been evaluated thus far have focused on how people's cumulative economic (dis)advantage affects family dynamics. However, this body of work is primarily based on objective economic indicators. A new strand of studies has introduced subjective perceptions of current experiences—such as insecurity regarding one's current job or financial situation—as a way to account for different reactions to the same objective condition (Kreyenfeld, 2010; 2015). Studies on fertility have found that people's perceptions play a distinct role in reproductive choices (e.g. Bhaumik and Nugent, 2011; Fahlén and Oláh, 2018), modifying the effect of objective measures of their past and present labor market circumstances on fertility intentions (Vignoli et al., 2020a) and behavior (Kreyenfeld, 2015).

The fundamental character of uncertainty itself is, however, rarely acknowledged in operationalizations of uncertainty that draw from objective conditions of employment and their subjective appraisals (Ranjan, 1999; Beckert, 2016). After all, uncertainty means the absence of clarity about one's future possibilities, hindering the ability to make rational calculations concerning future events (Beckert, 2016; Beckert and Bronk, 2018). Uncertainty is, thus, a forward-looking dimension by its very nature. In the new context of mounting uncertainty, people tend to consider not only past experiences and present status (the "shadow of the past"), but also future expectations, which represent what people expect will happen based on the available information (the "shadow of the future", Huinink and Kohli, 2014; Bernardi et al., 2019). This perspective is part of a larger and more established tradition in cultural sociology and social psychology that examines how future cognitions and imagined outcomes influence behavior (Mische, 2009). For example, Silva and Snellman (2018) investigated how young people construct future-self narratives that affect their perception of how valuable they think college is.

This viewpoint has been articulated by Vignoli and colleagues (2020b; 2020c) in their approach known as the "Narrative Framework", which introduced the concepts required to operationalize the role of the future in family dynamics. They contend that relying on objective

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factors alone offers a limited and possibly erroneous perspective on family dynamics, and that future expectations—that is, what people anticipate happening in the future based on the facts at hand—are relevant. Unstable labor conditions, for instance, might not be seen as a barrier to forming a union in light of anticipated employment stability or expectations of fast recovery from unfavorable economic circumstances. On the other hand, irrespective of an actual situation of employment stability, individuals might prevent union formation due to anticipated employment instability or a predicted incapacity to rebound from adverse shocks.

Humans use works of imagination that enable them to deviate from the predicted course of action (Dewey, 1922 [1957]; Mead 1932 [2002]). Therefore, expectations are not the only aspect of the future affecting decision-making. People might rely on their imaginative capacity to conceive a future that is different from what is likely to happen and then act to make that vision a reality (Beckert, 2016). Particularly, a family imaginary relates to the kind of family people hope to form in the future. Family plans frequently draw from visions of the future that can inspire people and keep them motivated, even under challenging circumstances (Tuckett and Nikolic, 2017; Vignoli et al., 2020b). In fact, life goals can come from imagination, regardless of the shadow of the past or (more or less realistic) expectations. For example, people may choose to cohabit or get married because they value union formation irrespective of serious economic constraints; alternatively, a family imaginary may center on the desire to remain unmarried by choice, despite advantageous financial circumstances.

The personal narratives of the future, which reflect the contingency plan for achieving the goals set by imaginaries, reconcile the shadows of the past and the future that influence family decisions. Personal future narratives are by definition embedded in the social environment. During the COVID-19 pandemic, for example, although most people were not directly affected by the virus and its health effects, they were subjected to government limitations and exposed to media narratives of an uncertain future (Guetto et al., 2022). Naturally, their personal future visions were influenced by these macro-level "shared narratives". Consequently, people may have become more anxious about the future, which has led them to reevaluate their plans to start families or get married. A new generation of fertility studies conducted before and after the COVID-19 crisis clearly showed that the (economic) uncertainty (as assessed by survey responses and experimental methods) had a direct impact on fertility intentions (Gatta et al., 2021; Manning et al., 2022; Vignoli et al., 2022). Regarding partnership formation, two empirical studies on the importance of conceptualizing and measuring economic uncertainty as a future-looking notion can be located among recently published papers.

In their 2021 study, Bolano and Vignoli sought to empirically separate the impact of the objective and subjective aspects of employment uncertainty on union formation in Australia. They investigated the extent to which, and how, objective measures of employment uncertainty (labor market status and type of contract) and subjective measures (employment security and expectations) were associated with a first union. Their findings demonstrate that both men and women are prevented from entering a union when objective employment uncertainty—unemployment or temporary (casual) jobs—is present. Additionally, across all employment conditions, different assessments of employment uncertainty are associated with union formation. For instance, union formation is not always delayed when people experience objective employment difficulties but expect their situation to improve, either by finding employment (especially for unemployed men) or keeping their jobs (for both genders with temporary employment arrangements). Bolano and Vignoli's study concludes that subjective measures of uncertainty, especially forward-looking measures that acknowledge the prospective char-

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acter of uncertainty, matter for partnership formation across different employment conditions. Therefore, people confronting objective conditions of employment uncertainty should not be viewed as a homogeneous group; rather, their study suggests that selection into union varies depending on the degree of subjective appraisals of employment uncertainty.

In another paper, Guetto et al. (2021) addressed the impact of COVID-19-induced uncertainty on union formation intentions in Italy through an online survey experiment, which allowed for an assessment of causation. The authors hypothesized that the expected duration of the COVID-19 emergency and its socioeconomic consequences may influence union formation plans. The results indeed offered support for such a hypothesis, confirming the crucial importance of narratives of the future for union formation. Irrespective of respondents' actual socioeconomic conditions, a narrative of growing future uncertainty in the form of a (mock) news bulletin about the pandemic's future development was found to be sufficient to negatively influence respondents' inclinations to marry their partner, especially among women and the less educated. The study illustrated that there is a causal relationship between future narratives and marriage intentions: marriage intentions were negatively impacted by people's perceptions that there would be a significant delay until a return to pre-pandemic conditions. A favorable family imaginary associated with marriage, however, fostered marriage intentions even in uncertain circumstances. On the other hand, COVID-19-induced uncertainty was found not to play an important role in the cohabitation intentions of respondents in a LAT relationship. Cohabitation, thus, turned out to be a living arrangement more compatible with a condition of uncertainty. Overall, these results indicate that the "shadow of the future" plays a sizable role in people's union formation intentions, net of more "conventional" aspects that have been emphasized in earlier research on partnerships.

24.4 PROSPECTS

In this chapter we have integrated conventional economic models and measurement approaches to the study of union formation by suggesting that subjective assessments and future narratives also be considered to gain a more compelling and up-to-date view of the linkages between the economy and partnerships. The simultaneous consideration of both the objective and subjective sides of economic uncertainty complicates matters but also strengthens family scholarship on union formation. We also reviewed evidence which found that future perspectives are crucial for union formation (e.g., Bolano and Vignoli, 2021; Guetto et al., 2021). We believe that this forward-looking viewpoint is particularly pertinent and pressing in the new COVID-19 world. The lack of certainty as to when, and even if, family life will return to its pre-pandemic state, the potential long-term health effects of the pandemic beyond the risks of the disease itself, employment uncertainty, and other changes in the economy are all distinctive features of the COVID-19 pandemic (Egidi and Manfredi, 2021), posing new difficulties for partnerships (Bellani and Vignoli, 2022; Vignoli et al., 2024).

From a methodological perspective, existing studies typically explore the relationship between indicators of employment uncertainty and union formation within an event-history framework, which makes it difficult to interpret the results in causal terms. As pointed out by Kreyenfeld (2021) in relation to fertility research, the association between time-varying indicators of employment status and partnership events may be influenced by anticipation effects. For instance, a woman's switch from employment to non-employment may be induced by the

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intention of getting married. Considering narratives of the future also represents a possible solution to tackle anticipation and integrate people's future plans into the statistical models (Kreyenfeld, 2021).

We conclude this chapter with a number of suggestions for future research on the connections between the (objective and subjective sides of) economic uncertainty and partnerships. First, in order to properly test the effects of increasing economic uncertainty on partnership formation, it is preferable to use precise measurements of the labor market situation, such as unemployment and short-term employment, while also paying attention to both genders and both partners within a union. Second, using solely objective indicators of employment difficulties gives a limited, and probably inaccurate, view of union formation: the specter of the future also matters. A promising line of research for the investigation of family life courses in the age of uncertainty is the inclusion of prospective measures of uncertainty—stemming from survey questions or experimental exercises—in empirical analyses. Third, the idea that the objective and subjective aspects of employment insecurity do not interplay seems conceptually weak and empirically dubious. Hence, we stress the importance of considering how subjective appraisals of employment uncertainty affect union formation across different objective employment conditions—that is acknowledging the interaction effect between objective and subjective states. Fourth, the thesis that cohabitation, as opposed to marriage, is more suitable given the unpredictability of today's world is supported by a number of studies, both American (e.g. Smock et al., 2005) and European (e.g. Vignoli et al., 2016; Guetto et al., 2021). In fact, a majority of youth in contemporary Western societies enter cohabitation at the beginning of their relationships (Lesthaeghe, 2020), but only the most economically stable progress into marriage. Hence, we emphasize the need to differentiate the form of union when studying the determinants and consequences of union formation and dissolution dynamics, especially in contexts where cohabitation and marriage continue to have different cultural and social connotations. Finally, although this chapter advances the importance of considering not only structural and objective economic conditions, but also how future economic-related narratives influence union formation, there is a need to expand the discussion around the role of uncertainty in family life courses from economic uncertainty to other forms of uncertainty. The future we face is not only unpredictable economically, but more and more often the unpredictability touches upon the social organization of contemporary nations and their political solidity. As such, the influence of social and political uncertainty in union formation represents a new, and promising, path for future research.

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PART VII

PARTNERSHIPS AROUND THE WORLD

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25. Partnering in Africa

Oluwaseyi Dolapo Somefun, Boladé Hamed Banougnin, Kirsten Stoebenau and Emily Smith-Greenaway

In all regions of the world, partnering is a complex and dynamic process that is shaped by multiple factors across the life course (Sassler, 2010; Shulman and Connolly, 2013). This is especially the case in sub-Saharan Africa, where partnering is notoriously complex. Although the region is highly diverse, featuring notable social, cultural, and demographic diversity both within and between countries, several practices surrounding partnering distinguish Africa as a global outlier (Bledsoe et al., 1998; Bongaarts and Casterline, 2013; Bongaarts et al., 2017; Casterline, 2017; Kebede et al., 2019; Shapiro and Hinde, 2017). Even so, marriage and partnering are dynamic, ever-evolving social institutions, with evidence of the emergence of international trends taking hold in Africa.

In this chapter, we offer a comprehensive overview of longstanding marriage and partnership traditions in Africa, describing the persistence of key cultural practices, including bridewealth, complex partnership formation traditions, and the persistence of polygyny. We then shift to describe the emergence of 'new' partnering dynamics in the region that mimic those occurring globally, including the rise of cohabitation and divorce. Next, we review evidence of evolving marriage and partnering trends in the region and describe growing evidence of the intersection of inequality and partnership practices. We conclude by emphasizing directions that we see as especially fruitful areas for future research on marriage and partnering in Africa.

25.1 MARRIAGE TRADITIONS IN AFRICA

One longstanding complexity of partnering in Africa is that in many societies it represents an arrangement not only between two individuals, but also between two extended kin networks, representing the central role that kin assume in matters related to marriage and family (Caldwell and Caldwell, 1987; Caldwell et al., 1992; Orubuloye and Caldwell, 1975; Smith, 2004). The formalization of romantic partnerships into marital unions often features the exchange between two groups in the form of bridewealth—a practice that persists in an estimated 80 percent of African societies (Vaughan, 1977). When a man and woman marry, their families negotiate an appropriate payment, such as goods (i.e., livestock, clothing, household items) and/or money (Aborampah, 1999). The man's family then pays the agreed-upon amount to the woman's family in a one-time payment or multiple installments over time.

The persistence of bridewealth in many African communities as a valued and desired practice (Hunter, 2016; Rudwick and Posel, 2014), even amid significant social, economic, cultural, and political change, is itself the focus of extensive sociological inquiry (Chae et al., 2021; Sennott et al., 2021). Other research emphasizes how bridewealth continues to influence partnering behavior and dynamics in the region. The practice of bridewealth can incentivize families to marry daughters early as a way to acquire new assets (Fenn et al.,

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2015), and can cast a 'shadow of indebtedness' over marriages (Dodoo, 1998; Horne et al., 2013)—decreasing women's autonomy by transferring their reproductive and domestic labor to their husbands. More recently, scholars have written about how the persistent—and in some cases intensifying—expectations surrounding bridewealth, combined with growing economic inequality, are making marriage feel increasingly unattainable to men (Chae et al., 2021; Hunter, 2016; Johnson-Hanks, 2007). Thus, the durability of this cultural practice, itself a key process in the attainment of social legitimacy and recognition of a union in African societies is, paradoxically, an emerging barrier to the formalization of marital unions.

Related to the practice of bridewealth, in some African societies, the formalization of partnerships as marital unions is an elongated, complex, and in some cases, ambiguous, process—not merely a discrete, singular marriage event (Calvès and Depledge, 2007; Hertrich and Lesclingand, 2012; Lloyd, 1994). Marital customs are such that it is often difficult to identify a particular date at which a union was 'formalized', or whether the union was ever 'formal'. In some cultures, the bridewealth payment is the main criterion for differentiating between a valid customary marriage and a non-formalized one (Kapepiso, 2022). However, this is not the case in other African societies. For example, in Malawi, couples typically regard themselves as married after cohabiting, with the act of moving in and setting up a household being the significant transition, even absent a formal ceremony (Clark et al., 2009). This differs in South Africa where co-residence is not a requisite feature of formal marriage due to labor migration (Hunter, 2016). Similarly, in the maSubiya culture, the marriage process involves satisfying the parents and elders with the family background of the potential spouse. If the families unanimously agree, the next step is a formal introduction to the entire family, and finally, the payment of the bridewealth (Kapepiso, 2022). Notwithstanding such variation, capturing salient processes of union formalization is important, as the extent to which these have been achieved carry consequences for lineage claims or inheritance, and may be predictive of union stability (Chae et al., 2021). By contrast, widely used dichotomous measures of current marital status alone fail to capture the processual nature of marriage, and omit meaningful distinctions in the process, shrouding our understanding of the significance of union formalization for health or social outcomes.

Another longstanding complexity of partnering in sub-Saharan Africa is diversity in the types of unions couples form, with both monogamous and polygynous partnerships still common. Indeed, polygyny remains surprisingly prevalent across contemporary African countries, defying predictions of its decline (Chae and Agadjanian, 2022). Much of the literature on this partnering practice has focused on its adverse consequences for women's and children's wellbeing (Oppong et al., 2019; Smith-Greenaway and Trinitapoli, 2014). For instance, Oppong and colleagues (2019) highlight the significant emotional toll that polygyny can have on women, as they are expected to suppress their feelings of jealousy, insecurity, and resentment towards their husbands and co-wives. The study also highlights the gender inequalities that underpin polygynous marriages in Cameroon, with women facing significant social and economic disadvantages compared to men. A growing body of literature, however, has offered counter-narratives, emphasizing instead the benefits—or innocuousness—of the practice (Lawson et al., 2015; Lawson and Gibson, 2018).

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25.2 INTERNATIONAL INFLUENCES ON PARTNERING: COHABITATION AND DIVORCE

Although the complexity of differentiating between formal and informal unions in many African societies has resulted in scholars paying little attention to this distinction historically, more recently scholars are acknowledging the rise in informal unions as a partnering phenomenon in need of careful research (Calvès, 2016; Gage-Brandon, 1993; Hunter, 2016; Pike et al., 2018). Indeed, arguably one of the most significant changes in family formation in sub-Saharan Africa is the rise of cohabitation. This trend is particularly prevalent in urban areas, where young adults are increasingly choosing to live together before getting married. Cohabitation is often seen as a precursor to marriage, yet some couples remain in non-marital partnerships due to some combination of constraints and preferences. One example of this are unions described as 'come-we-stay', documented as now widely practiced in Cameroon (Calvès, 2016) and Kenya (Bocquier and Khasakhala, 2009; Pike, 2021). These unions forged without kin involvement or consent facilitate easier formation and dissolution, with little to no legal or customary paternal support obligations to any children produced by the union upon separation (Madhavan et al., 2022). There is some evidence that less formal unions are more likely to dissolve (Chae, 2016). In addition, informal unions may be more likely to result from negatively sanctioned union formation trajectories. For example, one study in South Africa finds that women who have a child prior to marrying are more likely to remain in informal unions than those who give birth following marriage (Sennott et al., 2016). Even so, a notable proportion of non-marital pregnancies result in marital childbirth in many African countries (Smith-Greenaway and Clark, 2018)—reflecting the persistent significance of formal marriage as an institution in the region.

In addition to the complexity of the formation and formalization of partnerships in Africa, there is a nascent, but growing body of literature drawing attention to the complexity of relationship instability in the region, including the prevalence of divorce and re-partnering (Clark and Brauner-Otto, 2015; John and Adjiwanou, 2022). Using demographic techniques data from 34 Sub-Saharan African (SSA) countries, John and Nitsche (2022) emphasize the importance of understanding the timing of first union dissolution and the duration of time women spend outside of marriage. The study shows highly variable union dissolution rates across the region, with West African countries generally showing lower rates compared to Central, East, and South African countries. The study identifies women's autonomy, increasing education, workforce participation, intimate partner violence, and HIV prevalence as sources of high rates of union dissolution. Although select studies have shown that marital instability is associated with adverse outcomes for women and children (Clark and Hamplová, 2013; DeRose et al., 2017; Smith-Greenaway and Clark, 2017), the causes and consequences of partner instability generally remain understudied in the region, meriting further research on it as a growing phenomenon.

25.3 EVOLVING TRENDS IN AFRICAN PARTNERSHIPS

Although we have emphasized the persistence of many uniquely African cultural practices surrounding romantic partnering, the emergence of cohabitation and divorce signal the dramatic social and demographic change that has occurred in the region over the past 50 years—change

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that is likely to give way to further shifts in partnerships (Kabiru et al., 2013). Across the continent, adolescents are attending school for longer, living in increasingly urbanized areas, and are more connected to the global society via new technologies and media than ever before—all of which are helping to give way to new expectations, desires, and behaviors surrounding partnering.

Most notably, emerging evidence suggests that dramatic shifts in the timing of the transition to formal partnerships and parenthood are underway: young adults across diverse African countries are increasingly delaying partnering and parenting until older ages (Bongaarts et al., 2017; Garenne, 2014; Grant, 2015; Ikamari, 2005), mimicking trends observed in societies worldwide (Esteve and Florez-Paredes, 2018; Garenne, 2004; Rosero-Bixby et al., 2009). These shifts have been celebrated as potential sources of further economic growth and women's wellbeing, social status, and empowerment (Beegle et al., 2016; Bongaarts et al., 2017; Shapiro and Gebreselassie, 2014). Of course, these trends have not been universal: early marriages, including adolescent marriage, remain prevalent—and in select countries are increasingly prevalent—especially in West Africa (Garbett et al., 2021; Koski et al., 2017; MacQuarrie, 2014).

Although there are undoubtedly advantages associated with the trend toward African women marrying and having children later (Delprato and Akyeampong, 2017; Sunder, 2019), select accounts emphasize how economic vulnerabilities may not only drive some women to marry sooner than desired, but could also leave others not able to marry despite a desire to do so. For instance, Pike et al. (2018) offer one of the only examinations of the cultural and social notions of marriage in Nairobi, Kenya, with a particular focus on how gender influences young people's perceptions and desires. They used qualitative data collected through in-depth interviews and focus group discussions with young adults. The authors argue that marriage is an important marker of adulthood in Nairobi, particularly for women, who face social pressure to marry and bear children. They also note that traditional gender roles and economic factors play a significant role in shaping young adults' attitudes towards marriage and their ability to enter formal unions. The study finds that although many young adults aspire to marry, economic constraints for men and changing gender norms for women are causing some to delay or forgo marriage altogether.

As such, economic inequality may be changing the cultural attainability of marriage, which could explain evidence of a 'retreat' from marriage in some countries (Calvès and Depledge, 2007; Hosegood et al., 2009; Pauli, 2018). Moreover, other research has linked the rise in age at first marriage to high unemployment rates that negatively impact men's eligibility for marriage (Chae et al., 2021; Pike, 2021; Posel et al., 2011; Shapiro and Gebreselassie, 2014). Although rising marriage costs are often associated with urban settings, both Pike (2021) and Chae and colleagues (2021) use longitudinal data from rural regions to demonstrate the impact of rising marriage 'costs'. Both studies find that men with greater wealth are more likely to formally marry. Pike (2021) finds marriage timing is delayed for men who migrate for schooling to semi-urban areas. Chae and colleagues (2021) finds the practice of bridewealth payment declining over time in rural Mozambique, as it becomes restricted to wealthier men, arguing that the purpose of bridewealth too is shifting from entering contractual kin relationships to individual demonstrations of men's wealth and capacity to provide.

Complementing this literature, select development studies and ethnographic work have described protracted youth, or 'waithood' particularly among young men within the context of high unemployment (Honwana, 2012; Johnson-Hanks, 2014; Stasik et al., 2020). Waithood

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refers to the travails of would-be or aspirational elites—university-educated men (most often) who struggle to locate employment commensurate to their education, and therefore remain "youth". They put off marriage and family formation as they seek formal employment—the case for a rising subgroup of young men, particularly in countries where educational expansion has not kept pace with formal employment opportunities.

25.4 INEQUALITY AND PARTNERING

Although the above studies offer accounts of economic vulnerability acting as a barrier to marriage, other research has emphasized how the generally advantageous shift to later marriage and childbearing can also be unattainable for the most economically vulnerable. That is, even though the average age at marriage and childbearing is increasing among young adults in multiple African countries, motivating the above literature seeking to understand the localized processes driving these trends, increasingly researchers emphasize that the change is occurring against the backdrop of growing *variation* in these life course transitions (Batyra and Kohler, 2022; Stoebenau et al., 2021). In several West African countries, for example, across cohorts, the increases in the age at first marriage were concentrated among the upper half of the age-at-first marriage distribution (Batyra and Kohler, 2022). Indeed, the range of marriage timing in West Africa grew by a notable three years between the 1950s and 1980s cohorts—emphasizing the increasing dispersion in marriage timing. Similar changes—although smaller in magnitude—have been documented in Central and East African countries (Batyra and Kohler, 2022). Growing variation in the timing of formation partnering in sub-Saharan Africa does not necessarily portend a harmful social reality. Instead, it could result from social progress—signaling increasing tolerance of diversity in young adulthood and family patterns. For instance, rising variation in family formation patterns could be driven by a move towards egalitarianism, as women have gained more rights and independence such that young women are no longer beholden to tight scripts for the 'right' way to reach adulthood (Cole and Thomas, 2019).

Yet, more recently, research implies that the rising variation is driven by the rise in inequality in Africa. Research has shown that there are differences in family behaviors, like fertility, by education (Eloundou-Enyegue et al., 2017), and the age at first marriage has diverged by educational attainment within select countries (Frye and Lopus, 2018). Stoebenau and colleagues (2021) offered the most detailed evidence of this, examining if the rising variation in family formation patterns documented in sub-Saharan Africa (Batyra and Kohler, 2022) also correspond with increasing socioeconomic inequality in these settings. Stoebenau and colleagues (2021) adopted an approach that mirrored McLanahan's (2004) original depiction of the 'diverging destinies' framework. Studying successive cohorts, Stoebenau and colleagues (2021) differentiated between the most educationally advantaged women and the least educationally advantaged women in the 1960s, 1970s, and 1980s birth cohorts and show that there is growing divergence in the age at first marriage and the age at first birth for women who are educational elites relative to their counterparts across cohorts. Although in all cohorts the age of marriage and childbirth is significantly higher for more highly educated women, the size of the gap between the most and the least educated is significantly larger among the 1980s cohort relative to the 1960s cohort—signaling clear evidence of 'diverging destinies'.

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Thus, despite some research emphasizing that marriage is becoming 'out of reach' in select African contexts, even among those who have attained higher levels of education, these findings imply that in many African settings, poverty is still sending women into trajectories that lead them to early marriage and childbearing. In poor families navigating life in African contexts characterized by high poverty levels, rampant unemployment, unaffordable quality education, political conflict, and erratic weather patterns resulting in food shortages and desertification, adolescent daughters represent a potential source of bridewealth income, and thus may be explicitly encouraged to marry early (Fenn et al., 2015). High adult mortality and the corresponding concentration of the life course also serve to maintain the practice of early marriage (Beegle and Krutikova, 2008; Ueyama and Yamauchi, 2009). Moreover, for less educated women, motherhood often provides an important source of meaning and purpose in their lives (Smith-Greenaway and Yeatman, 2020). Having a child may even be a more certain route to attaining economic security that would otherwise be lacking (Bingenheimer and Stoebenau, 2016).

That elite women are those increasingly able to delay marriage implies that there may be an increasing concentration of economic opportunities among the elite—hence their being motivated to delay marriage in order to increase their upward mobility (Nitsche and Hayford, 2020). Further, with the competitive nature of securing an 'elite' job in a crowded labor market, women may increasingly delay having children through the uncertainty and rigor of the schooling, training, and internships that they must complete in the hope that they will eventually land a position—intentionally 'pacing' their life course in such a way that allows them to achieve competing goals (Eisenstein, 2021).

Further, the results may also reflect that educational elites are simply better equipped to fulfill any universal desire for later marriage and childbearing. That is, given that educational elites generally have greater access to, and use of effective contraception (Ainsworth et al., 1996; Garenne, 2004; Santelli et al., 2017), they may be best positioned to avoid unintended pregnancies—thereby delaying the transition to motherhood and marriage. Demographic and Health Survey (DHS) Program data remains the preeminent data source for studying partnering and parenthood in the region. Even so, DHS data are limited in their ability to facilitate exploration of the relative value of these explanations. Instead, more localized study designs may prove generative for understanding why diverging destinies are unfolding.

Regardless of the precise mechanisms driving this divergence, the growing disparities in partnering by socioeconomic status emphasize the need to acknowledge partnering as relevant to inequality in sub-Saharan Africa—both among adults and the next generation. To the extent that already socioeconomically disadvantaged women are now those primed to experience early marriage and childbearing—both of which are known to be detrimental to their own health and the wellbeing of their (future) children—implies that there is a real potential for partnering to play a role in worsening inequality in the region. Thus, scholars interested in social and health disparities should consider partnering as a fundamental pathway by which inequalities may take hold and reproduce.

25.5 CONCLUSION

There is continuity and change in marriage practices across sub-Saharan Africa. In terms of the former, partnering in Africa continues to be defined by the persistence of key cultural prac-

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tices, most notably bridewealth practices and polygyny. While Goode (1963) expected family change across the globe to move toward a homogenized, Western model, we see instead that 'traditional' formalization practices are persisting as they are incorporated into more contemporary features of union formalization in the region.

Even amid the backdrop of continuity in longstanding marital customs and practices documented in diverse communities across the region, there is growing evidence of marital change. Some of these changes are mimicking patterns observed globally, which may be attributable to factors like the expansion of education across Africa. Yet, we also describe the unequal nature by which these changes are taking hold in African societies, emphasizing the importance of research that recognizes the intersection of inequality and partnership practices.

The complexity of partnering, defined by both persistence and change, in Africa means that family scholars have no shortage of topics to explore going forward. Indeed, it is important to note that the research that we discuss here is historically abbreviated. Due to censoring and the retrospective nature of much fertility and marital data, combined with a lag between data collection and availability, most research described here has focused on women born in the 1980s or earlier. Questions of the stability of these trends remain unanswered. It is unclear if the divergence in partnering observed among recent cohorts is a fleeting trend or one that will persist, or grow with time. Some scholars suggest that the conditions to support demographic convergence are growing. Specifically, with increasing migration, as well as the 'shrinking' of the world with the rising availability of technology connecting youth (Pesando, 2022), it is possible that the diffusion of ideals will lead to models of family formation becoming more similar. Efforts to assess the stability of marriage and partnering trends in Africa among adults born in the 1990s and 2000s cohort will help to clarify whether the findings outlined here are shifting in new ways.

As researchers continue to grapple with the persistence of uniquely African marital and partnering traditions while they seek to document and explain the evolution of partnering practices and emergence of new trends, we see value in research that extends the existing literature in two specific ways. First, efforts to attend to the nuanced differences in partnering trends within African countries have the potential to significantly advance our understanding of diversity in marriage and partnering practices in the region. Due to the legacy of colonialism, and the sometimes-arbitrary imposition of country borders in the region, African countries are notoriously diverse in terms of ethnicity, cultural and social norms, economic conditions, geographic realities, and population density. Moreover, partnering practices are known to differ dramatically between communities within single African contexts (Avogo and Somefun, 2019; Smith-Greenaway and Clark, 2017; Smith-Greenaway and Trinitapoli, 2014). In-depth cross-comparative country case studies may also be useful for clarifying the specific macro-economic, social, and cultural contexts in which marriage and partnering practices persist or evolve.

Second, we also see a strong potential for research that includes men in the study of partnering. Most research studies the dyadic process of 'partnering' with an unapologetic focus on women—a tendency that is indicative of a broader pattern in family demography, despite calls to expand the canon and incorporate men. A growing number of studies have shown that studying men can challenge the universality of stylized facts derived from research on women (Amo-Adjei and Tuoyire, 2018; Batyra et al., 2021; Conzo et al., 2017; Dodoo, 1998; Schoumaker, 2019). Further efforts to incorporate men fully into the study of marriage and

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partnering may prove to be particularly insightful in the context of Africa, given that they exert considerable influence over resources.

Expanding research in these ways has the potential to offer simultaneously more textured and comprehensive accounts of the marital and partnering practices that continue to define the African region. Although we anticipate the persistence of age-old marital and partnering practices that distinguish the region, such as bridewealth, complex marital customs, and polygyny, careful analyses of the evolving nature of these practices are essential to understanding how social, demographic, and economic change is shaping local customs—even in subtle ways. Moreover, future efforts to track the evolving nature of marriage and partnering—and the drivers of these transformations—will continue to shape our understanding not only of romantic relationships in the region, but also of social inequality, family, and demographic change more broadly.

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26. Partnering in the Middle East and North Africa

Mohammad Jalal Abbasi-Shavazi and Meimanat Hosseini-Chavoshi

The MENA region refers to some of the developing countries located in the Middle East and North Africa. The MENA region is predominantly Muslim, and around 98 per cent of the population in most countries in the region adhere to Islam, apart from Egypt and Lebanon where Muslims constitute 93 percent and 65 percent of the population respectively (Karim et al., 2022; Pew Research Center, 2011). Despite the religious similarity, the region consists of countries with diverse demographic, economic, and socio-cultural backgrounds. The common list of countries included in the MENA region by most United Nations agencies and programs is 13 countries in the Middle East (Bahrain, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Palestine, Qatar, Saudi Arabia, Syria, United Arab Emirates (UAE), and Yemen) and five countries in North Africa (Algeria, Egypt, Libya, Morocco, and Tunisia). In this chapter, partnering issues and characteristics are explained and discussed for these 18 countries plus Turkey.

The aim of this chapter is to highlight major changes in families and partnerships in the MENA region. Unfortunately, the region faces serious data limitations and a lack of surveys to study families and partnerships. Therefore our analysis relies mainly on available data from UN agencies and published studies.

26.1 THEORETICAL CONSIDERATIONS

Studies have shown that during the last century, some aspects of the family in the Middle East and North Africa have changed while others have continued over time (Yount and Rashad, 2008a, De Bel-Air et al., 2018). For instance, there has been a shift from early to late marriage, from arranged to companionate marriage, from extended to nuclear households, and from familistic to individualistic kinship relations, while consanguineous marriage is still being practiced. Krafft and Asaad (2020) report that marriage in MENA is still a critical stage in the life course, marking the completion of a young person's transition to adulthood. Despite the diversity of Arab countries in terms of their positions within the stages of nuptiality transition, they have all experienced important changes in the tempo and intensity of marriage as well as in the characteristics and patterns of marriage (Rashad, 2015).

The question is: how can family change and continuity in the MENA region be explained? Based on modernization theory, structural change, along with urbanization, the expansion of education, the growth of state power, and the rise of democracy have resulted in the transformation of the family (Goode, 1963). Thornton (2001; 2005) proposed the term 'developmental paradigm', by which scholars believe that all societies have progressed at a varying pace through the same stages of development. However, proponents of ideational change have argued that an over-emphasis on *structural* determinants have disregarded the role of *ideology*

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in the process of family change (Yount and Rashad, 2008b: 4). According to these authors, the spread of values, including secularism and materialism, have been fundamental determinants of family change in Europe and elsewhere (Lesthaeghe and Meekers, 1987; Thornton, 2001; 2005).

There is strong evidence that early basic education is associated with later age at marriage (Jejeebhoy, 1995; Smith et al., 2009; Lutz and Skirbekk, 2014). The greater participation of women in education and the labor force results in more knowledge, higher women's autonomy, changing gender norms, and consequently delays marriage and family formation (Singerman, 2007). Schooling and education have been considered as both structural and ideational forces behind family change. Schooling may change the social and economic networks in which people live and expose them to new ideologies about family and society. Furthermore, education may impact the opportunity cost of a woman's time as well as the quantity–quality margin of child investment (Becker, 1965; Becker and Lewis, 1974; Geruso and Royer, 2018).

Some scholars have endorsed the simultaneous effects of material, structural, and ideational forces on family life in countries of the MENA region (Ibrahim, 1981). In relation to family change, McDonald (1994) has argued that an idealized family morality is a fundamental component of the culture of all societies. The extent to which societies will be open to change will vary according to the degree to which deviation from the idealized morality is tolerated. In particular, as McDonald expressed, little variation from the idealized family morality has occurred in countries where the family system is reinforced by a strong social morality (see also, Abbasi-Shavazi and McDonald, 2008). In this chapter, the transformation of the family in MENA region is described and explained, taking into account these theoretical considerations.

26.2 FAMILY IN THE MENA REGION: DIVERSITY, CONTINUITY, AND CHANGE

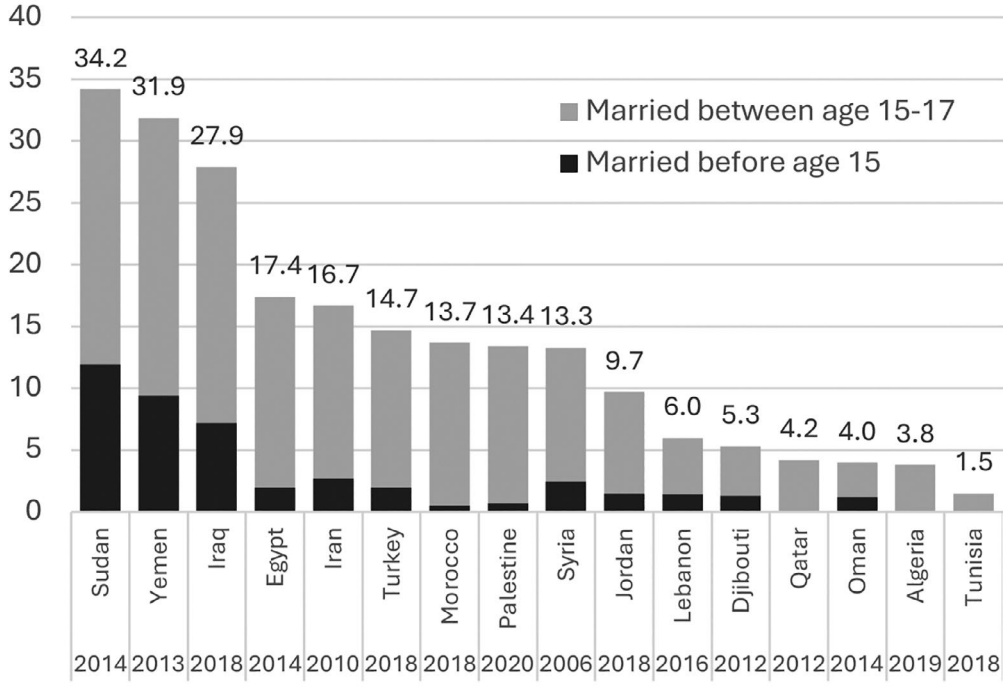
26.2.1 Age at Marriage

One of the main features of family in every society is the legal minimum age for marriage and the average age that men and women marry. The legal age of marriage is most commonly 18 years old, but there are variations based on religion and jurisdiction, and in some countries, a significant proportion of women marry under the legal age of marriage. UNICEF defines under-age marriage or child marriage as any formal marriage or informal union when one or both couples are under the age of 18. The legal age of marriage in the MENA region varies from 13 in Iran to 20 in Libya (Underage Marriage in the Middle East and North Africa (MENA) Region (fanack.com). In most countries in the MENA region, the legal age of marriage for both women and men is 18, and in a few countries such as Kuwait, Bahrain, Qatar, and Syria it ranges between 15 and 17. However, there are some legal exceptions, which make it possible for girls to get married before reaching the legal age of marriage. Lebanon has no minimum legal age of marriage for all its citizens due to religious diversity. In Saudi Arabia, a new draft of family law would raise the age of marriage and prohibit child marriage (https://divorceinrussia.com/international-family-law-saudi-arabia-bill-stop-child-marriage/), but there is no evidence of ratification of the bill available yet.

According to the United Nations Children's Fund (UNICEF, 2019), 15 per cent of women aged 20–24 were married before the age of 18 in the MENA region and 2 percent of these

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women were married before the age of 15. There are major differences on the country level, ranging from 2 percent married before reaching the age of 18 in Tunisia to 32 percent in Yemen (Figure 26.1).



Source: UNICEF global databases, 2022, based on DHS, MICS, and other national surveys. Updated May 2022. https://data.unicef.org/resources/dataset/child-marriage/.

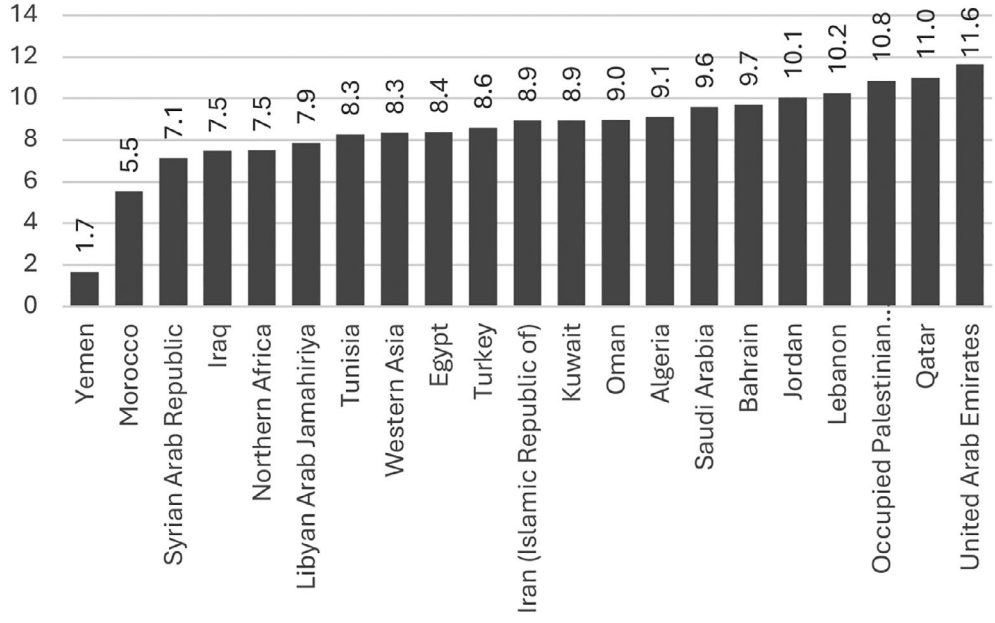
Figure 26.1 *Early marriage in the MENA region: percentage of women aged 20–24 years who married before age 18 and age 15*

While age at marriage is legally bound in the MENA countries, women marry before the legal age based on social and cultural settings where they are living. For instance, even though the legal age of marriage is 18 in Iraq and Egypt, 18 and 15 percent of women aged 20–24, respectively, married before the age of 18. On the other hand, while there is no legal age of marriage in Yemen, close to 23 percent of women aged 20–24 married before the age of 18 and around 9 percent married before the age of 15 (Figure 26.1). This suggests that the institutional control of the minimum legal age remains necessary but not sufficient (Rashad, 2015).

Along with the modernization theory, a question arises as to how much education correlates with the percentage of minors' marriages among women in these countries. There was no data available to address this question, but a general observation from the estimated mean years of schooling for women aged 15 and above in selected countries in the MENA region in 2020 (Figure 26.2) indicates a negative relationship between the level of education and the

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percentage of minor marriage. For instance, Yemen, with the lowest mean year of schooling, recorded the second highest level of under 18 and under 15 marriages among women. This is similar in Iraq. On the other hand, Lebanon, Qatar and Jordan had high estimated mean years of schooling among women, where the percentage of minor marriage is lower as compared to other countries.



Source: Wittgenstein Centre for Demography and Global Human Capital (2018). Wittgenstein Centre Data Explorer Version 2.0.

Figure 26.2 Estimated mean years of schooling for women aged 15 and above in selected countries in the MENA region, 2020

Poverty and food insecurity, conflict, culture, religious dogma as well as other reasons including discriminatory gender roles, lack of access to education and job opportunities, insecurity in the face of war and conflict, the force of custom and tradition, lack of agency, and fear of girls' sexuality and pregnancy are among the driving forces behind the under-age marriages (UNICEF, 2019; Psaki et al., 2018, Psaki et al., 2021). Child marriages have surged among all forcibly displaced populations. For instance, in Iraq, child marriages stood at 15 percent in 1997 but increased to 28 percent in 2018. In Yemen, with no legal minimum marriage age, two-thirds of marriages involve under-age brides, including 44 percent under the age of 15. Child marriages in pre-war Yemen stood at 32 percent (Figure 26.1). In pre-war Syria, 13 percent of Syrian women aged 20–24 were married before the age of 18, but child marriages have increased among all Syrian populations, including those not displaced. It has been argued that parents are fearful for girls' safety and their "honor" and use marriages to safeguard their

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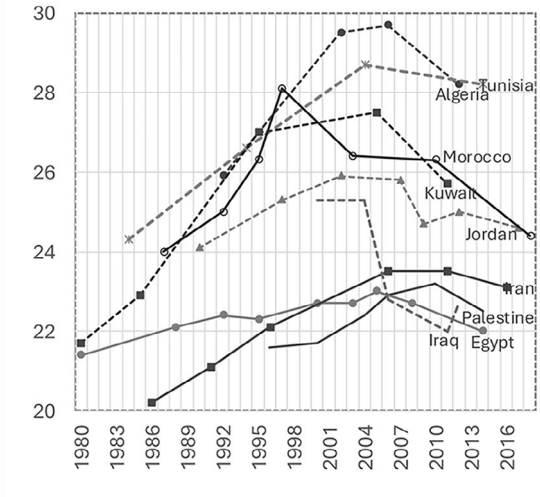
daughters (Karasapan and Shah, 2019). The continued pattern of early marriage has also been related to the arranged marriage system and the role of consanguineous marriages, which will be discussed later in this chapter.

Despite the varying levels of child marriage in the MENA region, in general, the average age at marriage has increased during the last four decades in all MENA countries. However, the trend of marriage varied across countries. Such countries as Qatar, Oman, Saudi Arabia, Algeria, Tunisia, and Kuwait have experienced a steady rise in age at marriage since the 1980s (Figure 26.3b). The average age at marriage for women in these countries went through a phenomenal increase of 2–4 years after the 1980s. Other countries, including Tunisia, Algeria, Morocco, Kuwait, Jordan, Palestine, Egypt, and Iran shown in Figure 26.3a recorded a rise in age at marriage in earlier periods followed by a decline. The decrease can be due to demographic factors (i.e. marriage squeeze) leading to the rise and fall, or because of political and policy factors encouraging early age at marriage in the later period. For example, the Singulate Mean Age at Marriage (SMAM)[1] for women in Iran increased from 19.7 in 1976 to 23.4 years in 2011 (Hosseini-Chavoshi et al., 2017) but declined slightly by 2016. This decline has been due to the period increase in the number of marriages for a large number of post-revolutionary baby boom generation entering the marriage market. This period coincided with the introduction of the pronatalist policy in Iran. The decline in age at marriage in other countries may partly be explained by the increase in child marriage or some major social movements and conflicts in these countries (Lokot, 2023).

According to the available data, the majority of women in 13 countries in the MENA region (and Turkey) marry between the ages of 25 and 29, while most women in five countries (Iran, Saudi Arabia, Yemen, Palestine and Oman) marry between the ages of 20 and 24 (https://en.wikipedia.org/wiki/List_of_countries_by_age_at_first_marriage). The youngest mean age at marriage for women is recorded for women in Palestine (20.1 years) and Saudi Arabia (20.4 years). As expected, men's mean age at marriage is higher than women in the region. Age at marriage for men in nine countries is above 30 years, and the highest figure is found for men in Lebanon (32.8), Tunisia (32.6), Algeria (32.4), and Libya (32.0). The lowest age at marriage for men is recorded in Palestine (20.1) and Saudi Arabia (20.4).

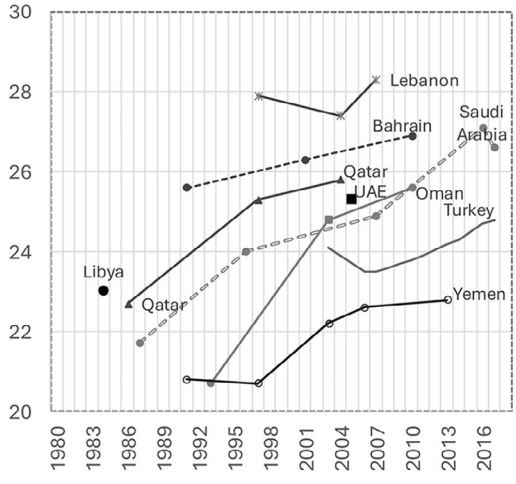
In brief, the age at marriage has increased, and the universality of marriage is in decline in the MENA region, although the proportion of never-married may not be high when compared to other countries in Europe, the Americas, and East Asia.

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Source: See https://ourworldindata.org/grapher/singulate-mean-age-marriage-women.

Figure 26.3a Estimated average age at marriage for women by the UN, available data from 1980 to 2018, Muslim majority countries in the MENA region, part 1



Source: See https://ourworldindata.org/grapher/singulate-mean-age-marriage-women.

Figure 26.3b Estimated average age at marriage for women by the UN, available data from 1980 to 2018, Muslim majority countries in the MENA region, part 2

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26.2.2 Arranged versus Modern Marriage

Arranged marriage is a type of marital union where the bride and groom are usually selected by individuals other than the couple themselves, particularly by family members such as parents. In some cultures, a professional matchmaker may be used to find a spouse for a young person. Arranged marriages have historically been prominent in many cultures, notably in Muslim countries and South Asia (Jones, 2018: 352). As discussed by Allendorf in Chapter 7 in this *Research Handbook*, the practice of arranged marriage has declined substantially in favor of the modern type of marriage or love match during the twentieth century (Allendorf and Pandian, 2016; Jones, 2018). Increasing levels of education, particularly for females, and the movement of younger generations from hometowns to big cities for higher education and work have provided the opportunity for both girls and boys to find partners outside of their kin network and adapt to the new and modern type of marriage arrangements.

In the Middle East region, the large labor migration to and within the Persian Gulf countries has led to the new pattern of living apart by couples (due to the limitations of family reunification by the host countries – see Fargues, 2006) and modern types of marriage. Indeed, cultural changes, and rapid transformations of attitudes, mindsets, and expectations are emerging in the Persian Gulf region. Economic globalization, the mobility of elites and their children for studies, healthcare, discovery and pleasure trips are exposing citizens to transnational models of gender roles and well-being. In addition, the massive incorporation of foreign domestic workers in households brings on additional changes (De Bel-Air et al., 2018). Furthermore, due to war and conflicts, many people in the MENA region have been forcibly moved and either displaced internally or have taken refuge in neighboring or European countries (Foppiani and Scarlatescu, 2017; Abbasi-Shavazi et al., 2018; Lokot, 2023). As expected, these movements have led to the transformation of arranged marriage among the most recent married couples in the MENA region (Rashad et al., 2005; Yount and Rashad, 2008a).

26.2.3 Consanguineous Marriage

Consanguineous marriage tends to be prevalent in societies where the interaction between young women and men from outside close kin is highly restricted. It is therefore prevalent in many Islamic societies (Jones, 2018). The most common form of consanguineous unions is between first cousins in Muslim countries in North Africa, Central and West Asia, and in most parts of South Asia (Bittles, 1994: 562). In these regions, marriage to biological relatives has accounted for 20 percent to over 50 percent of all marriages in recent generations (Bittles, 1994: 563). For example, consanguineous marriage has long been the culturally preferred form of marriage in Iran (Givens and Hirschman, 1994), and around 40 percent of marriages are consanguineous, ranging from approximately 20 to 80 percent, depending on community and ethnic group (Saadat et al., 2004), a practice that has remained surprisingly resilient despite modernization (Farhud et al., 1991; Givens and Hirschman, 1994; Saadat et al., 2004; Abbasi-Shavazi et al., 2008). Levels of endogamy and consanguineous marriage have remained high, ranging between 10 and 40 percent in many countries in the Middle East, North Africa and West Asia, including the Persian Gulf countries (De Bel-Air et al., 2018; Akyol and Mocan, 2021). There is a very high prevalence of consanguineous marriage in Oman, as more than half of marriages are consanguineous. First cousin unions constitute 39 percent of all marriages and 75 percent of all consanguineous marriages (Islam, 2012). There has been

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no appreciable change in the prevalence of consanguineous unions in Oman over the last four decades despite massive socioeconomic development and modernization, and it has been suggested that consanguinity is likely to remain stable in the future or decline at a slow rate. In some Arab countries it is even increasing (Jurdi and Saxena, 2003; Bener and Alali, 2006). However, some Arab countries such as Jordan (Hamamy et al., 2005), Lebanon (Khlat, 1988), Bahrain (Al-Arrayed and Hamamy, 2011) and Palestinian Territories (Assaf and Khawaja, 2009), show a declining trend in consanguineous marriages.

The reasons most commonly given for the popularity of consanguineous marriage can be summarized as: strong tradition; maintenance of family structure and property and strengthening of family ties; financial advantages relating to dowry or bride price; ease of marital arrangements and a closer relationship between the couple and their in-laws; as well as greater marriage stability and durability (Khlat et al., 1986; Bittles, 1994; Khlat, 1997; Hussain, 1999, El Goundali et al., 2022). Jarallah (2022) argued that in times of war, women and their families resort to marriage as a protective strategy, although the strategies differ across countries. Women in Lebanon strategize out-group marriages to diversify resources by establishing new alliances through marriage, while in-group marriages decline. Palestinian women, on the other hand, show more heterogeneity, with some women maintaining existing familial bonds through in-group marriages, while others diversify resources through out-group marriages to facilitate new alliances.

According to Goode's thesis on the family (Goode, 1963), the incidence of consanguineous marriage should decrease as modernization progresses and an increasing number of individuals begin to freely choose their mates from a broader pool of potential marriage partners. Moreover, based on ideational theory (Lesthaeghe and Meekers, 1987; Thornton 2001; 2005), modern communications and mass media promote change in culture and ideals by demonstrating alternative ways of living, and all these factors could lead to a disruption of traditional family formation patterns. As discussed earlier, the MENA region has experienced a phenomenal social, economic, and cultural transformations by which the level and pattern of consanguinity and kinship marriage among the educated and the young generations has declined in recent decades (Yount and Rashad, 2008a; De Bel-Air et al., 2018).

26.2.4 Divorce and Family Dissolution

Divorce has traditionally been rare in Islamic countries and for the MENA region, but it varies among countries. Available information in Table 26.1 shows that the trend in divorce has been on the rise for some selected countries in the region. For instance, the rate of divorce in Egypt, Iran, Lebanon, and Saudi Arabia has increased over the last two decades. The trend in divorce in Kuwait has, however, declined from 2.3 to 1.3 per 1000 during 2004 and 2020.

Based on the data available for selected countries in the MENA region, a significant proportion of divorces have taken place within the first 3–4 years of marriage. Close to 60 percent of divorces in Qatar occurred less than one year after marriage. In Palestine and Kuwait, around 65 and 57 percent of divorces, respectively, took place within the first two years of marriage (Figure 26.4). Mendoza et al. (2019) argued that marrying at an early age is encouraged by Arab culture, but it is also a major risk factor for marital dissolution because the individuals are not mature enough, may not have full decision making, are less financially stable, and may have had minimal educational progress. For these reasons, they may not conceive in the first year or two of their marriage. It is notable that around 14 percent of women in Palestine marry

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Table 26.1 Divorce rate (per 1000 population) in MENA region

Country	2004	2014	2019/2020
Algeria[a]	–	1.6	–
Egypt	0.9	1.9	2.3
Iran	1.1	1.9	2.1
Jordan	1.9	2.5	1.6
Kuwait	2.3	1.7	1.3
Lebanon	1.1	1.4	1.6
Libya[b]	2.5	–	–
Qatar	1	0.6	0.7
Saudi Arabia	0.9	1.1	2.1
Syria	1.3	–	–
Tunisia	1	1.2	–
Turkey	1.4	1.7	1.6
United Arab Emirates	0.8	0.5	–

Notes: a. Figure is for 2013; b. Figure is for 2008. A table showing the divorce rate per 1000 population across various countries in the MENA region.
Source: See https://ourworldindata.org/grapher/singulate-mean-age-marriage-women.

below the age of 18, a type of under-age marriage that is more likely to lead to divorce soon after marriage.

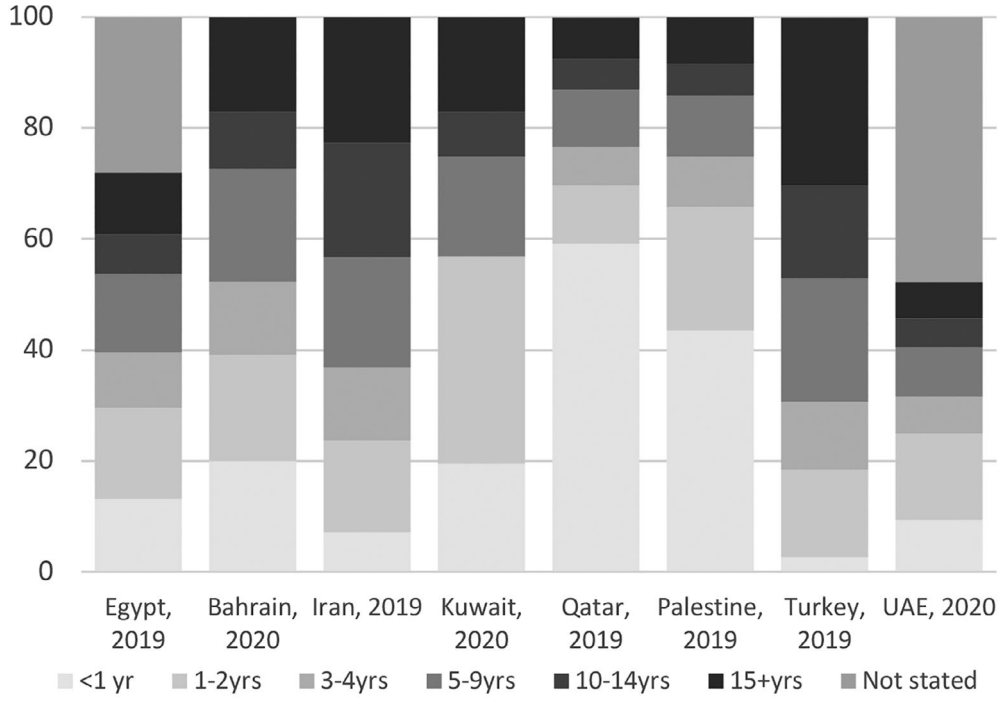
Arranged marriage has also been considered as one of the reasons for divorce as the couples are married through family negotiations rather than their own decision in Asia (Jones, 2018), and family interference has often been cited as a factor that threatens the stability of marriage. With the rise of education and urbanization, younger generations have become financially independent and taken more of a role in their marriage and family formation decision making, but divorce has also been on the rise.

Economic insecurity is one of the factors influencing the rising age at marriage and the instability of the family. Using data from ten MENA countries over the period of 1990–2014, Gholipour Fereidouni (2016) showed a positive and significant long-run relationship between housing costs and divorce rate in the MENA countries Increase in housing costs not only delays marriages in the region (Mulderig, 2013), but is also associated with higher divorce rates and marital instability in the MENA countries.

Nowadays, "incompatibility" also plays a role in divorce. This was not the case in the past, where divorce was seen as a failure, irresponsibility, and a deviation from cultural norms (Al-Kazi, 2008). Aghajanian and Thompson (2013) noted that some aspects of the Iranian family, including marital dissolution, are changing rapidly, no longer protected by the strong tradition of family morality rooted in social contracts between large extended families. Instead, there is a strong secular move toward individualism and self-actualization leading to earlier and more frequent marital dissolution.

Substantial increases in the divorce rates in the MENA countries show a significant change in circumstances and attitudes to divorce, because in the past divorce carried a considerable stigma, and there was pressure to remain in a disharmonious marriage for the sake of children, social appearances and family honor. In addition, less restrictive divorce regulations in some of the MENA countries may have also contributed to the rise of divorce (Rashad et al., 2005; Rashad, 2015; Singerman, 2005).

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Source: United Nations (2021).

Figure 26.4 Percentage distribution of divorce by duration of marriage for selected countries in MENA region in 2019 or 2020

26.3 THE FUTURE OF FAMILY AND PARTNERSHIP IN THE MENA REGION

The family and marriage systems in the MENA region have proved robust, but some aspects of the family have changed significantly. Age at marriage for women and men has risen substantially in countries where arranged marriage has collapsed. Consanguineous and endogamous marriage is still being practiced in many Muslim countries in the region, but it has declined among the youngest generations. The rise in age at marriage leads to a higher proportion of never-married women and men aged 25–35. Consequently, the level of singlehood, which has been traditionally low in the MENA countries (Kumon and Saleh, 2023), is likely to rise. De Bel-Air et al. (2018) noted that women's singlehood, once a relatively marginal phenomenon in Bahrain and Kuwait and extremely rare in Saudi Arabia, could also become a social reality. In Bahrain, Qatar, and Kuwait, about 10 percent of women in the 45–49 age group had never married. The steady increase in the proportion of women aged 35 and over remaining single along with ideational changes towards marriage among the educated younger generation suggests that the phenomenon could spread throughout the region. Rising divorce rates and reduction of stigma towards family dissolution will also make divorce more socially acceptable, and thus, remarriage rates will increase and occur sooner compared to the past. With these

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diverging patterns of family and marriage systems, the question arises as to what the future of partnering and parenting in the MENA region will be.

The rise of education has not been translated into employment for women (Torabi and Abbasi-Shavazi, 2015; De Bel-Air et al., 2018: 5; Abbasi-Shavazi and Jones, 2019), which has implications for marriage and family formation. Jones (2012: 40–41) argued that high unemployment combined with very low female labor force participation reflects the strong cultural, social and economic gender division in the Middle East. The low innovativeness and productivity of their higher education system is another reason for the under-utilization of labor, particularly for females in Muslim countries. Salehi-Isfahani (2013) noted that high investment in schooling with low productivity and imbalance in marriage markets resulting in delayed marriage are common in the MENA region (see also Salehi-Isfahani and Egel, 2010). Selwaness and Krafft (2021) found that in Egypt, Jordan, and Tunisia getting married was strongly associated with women's employment outcomes. Krafft and Assad (2020) also examined the role of employment in enabling and constraining marriage for young men and women in Egypt, Jordan, and Tunisia. They found that for men, employment, and especially high-quality employment, was associated with more rapid transitions to marriage. For women, past employment statuses were associated with more rapid transitions to marriage. Their finding confirmed that employment in the public sector (a type of high-quality employment) significantly accelerates marriage for men in Egypt and women in Egypt and Tunisia.

A new pattern of long-distance partnership has evolved in the MENA region due to the large scale of labor migration to the Persian Gulf countries. Many couples are living apart due to the limited right for family reunification by the host countries (Fargues, 2006: 19). Marriage with foreigners and the massive incorporation of foreign domestic workers in households have brought additional changes to family (De Bel-Air et al., 2018). This has weakened the traditional form of marriage and has increased the role of women in marriage and family institutions.

Religiously and culturally, extramarital sex is unacceptable, and cohabitation outside of marriage is rare in Muslim countries and the MENA region in particular (Gilbert and Ben Brik, 2022). However, the expansion of higher education and universities in capital cities has led to the movement of girls and boys to the capital cities and away from their parental home. There are unofficial reports that there is an increasing trend of "living together" among boys and girls in Iran, called "white marriage", which literally means their marriage has not been registered (Khalajabadi-Farahani, 2016; Ahmadvand-Shahverdi et al., 2022). Conducting a meta-analysis of premarital heterosexual relationships among young people in Iran during 2001–2015, Khalajabadi-Farahani (2016) found that of the total sample size of 14 989 adolescents and young people, non-college students and college students who were residents of Tehran and a few other provinces, the prevalence of premarital sex was estimated to be 22.5 percent in Tehran and 14.7 percent in other provinces. There was a remarkable gap between men and women (29.1 vs. 12.0 percent). With the rising trend of divorce along with secularization, another trend of cohabitation among older adults may arise as women who are separated may choose to live with another man (as a partner) without registering their marriage. It has been noted that with the rise of age at marriage as well as the rise in the divorce rate, the number of people who cohabit without marriage before marriage or after the dissolution of marriage has increased in Iran (Kousari and Askari, 2016; Golchin and Safari, 2017). Gilbert and Ben Brik (2022: 22) noted that the rising age of marriage in Arab countries "suggests that first marriage no longer systematically coincides with first sexual intercourse". Despite these

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changes, there is strong religious and moral disapproval of sexual relations before marriage, and public opinions towards cohabitation remain conservative in the Muslim countries in the MENA (Rashad, 2015). Given the context and sensitivity of the issue, there is a lack of data and information to examine the trend and patterns of this emerging trend of partnerships in the region but the issue warrants further research.

Despite transformations of social and demographic characteristics of the MENA region, family systems in the region will not converge to one pattern as proposed by modernization theory (Goode, 1963; Thornton, 2001; 2005). Changes will likely occur in the same direction, but the differences in countries remain due to cultural and historical settings in each country. This means that although marriage will remain largely universal, there will be an increasing trend of singlehood in some societies. Likewise, although the age at marriage will increase, there will be significant numbers of under-age marriages. Divorce will likely rise, but according to McDonald's (1994) idealized family morality theory, the change will be slow and the pace of change will be context-specific. Political changes may disrupt or slow down the rising trend of age at marriage or it may reverse the rising trend as it was experienced in post-revolutionary Iran (Abbasi-Shavazi and McDonald, 2008). Evidence suggests that the younger generations in the MENA countries will experience a different life course as compared to the older generation through making decisions about their marriage, marrying later, having fewer children, and living apart from their parents. If this trend continues, the household composition will also shift towards the nuclear family and a smaller household size.

The increased age at marriage and singlehood in the MENA region have already led to social anxiety and concerns (Rashad, 2015), and governments in Iran (Hosseini et al., 2017) and Arab countries of Qatar, Kuwait and Saudi Arabia have launched national campaigns and introduced new policies and programs to urge young people to marry and contribute to the stability of the nation (Rajakumar et al., 2017: 95). However, with the social and cultural transformation of societies, the impacts of such policies and campaigns are yet to be measured.

NOTE

1. The singulate mean age at marriage (SMAM) is the average length of single life expressed in years among those who marry before the age of 50.

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27. Partnering in East Asia

Yen-hsin Alice Cheng and Chen-Hao Hsu

With a variation of population size from 3.3 million in Mongolia to 1.4 billion in China, more than one-fifth (roughly 1.6 billion) of the world's population resides in East Asia. This region is also home to some of the fastest-growing economies, such as Hong Kong, Japan, South Korea, and Taiwan. For centuries, East Asia has been characterized by an early and universal marriage regime (Cheng and Kolk, 2021), yet increased family diversity and heightened singlehood have become the new reality in the second decade of the twenty-first century. During the first half of the twentieth century, the share of never married men and women aged 45–49 used to be below 5 percent in this region (Jones and Yeung, 2014) and has risen to 10–25 percent now, depending on sex and country, with the exception of China, where universal marriage still holds (Cheng, 2020; Yu and Xie, 2022). With rapid social and economic development, rising educational attainment and labor force attachment for both men and women have had a far-reaching demographic impact on East Asians' partnership behaviors. Evolving information and transportation technologies have also transformed the ways people meet partners and form unions, resulting in more cross-border marriages and online dating behaviors (Low et al., 2022; Yeung and Mu, 2020). In 2019, East Asia has also become home to the first Asian country—Taiwan—to grant marriage rights to homosexual couples. While traditional socio-cultural values regarding union formation remain important in East Asia, it has nevertheless become one of the most intriguing regions to explore the unforeseen changes taking place in partnering processes.

27.1 ECONOMIC, SOCIAL AND LEGAL CHANGES IN EAST ASIA

East Asia has experienced tremendous economic growth in the second half of the twentieth century, and it has been the major driver of improved women's status and family changes. An impressive increase in GDP per capita has been observed in all societies during the post-war years, although at a varying pace. The economy of Taiwan and Korea took off in the 1980s, while that of Japan improved earlier and China a few decades later. Rising labor demands following economic growth have prompted governments in most of these societies to expand educational opportunities or to lengthen the duration of compulsory education. The growth of men and women aged 25–29 with tertiary education since 1970 in these five societies has been substantial—more than half of the population was tertiary-educated by the 2010s except in China (Cheng, 2020). Such rapid educational expansion also contributed to more women entering the labor force. Female labor force participation (FLFP) patterns at prime ages in Japan, Korea, Taiwan, and Hong Kong have shown impressive growth since 1990 (Cheng, 2020).

In addition to these socioeconomic developments, some major legal changes to the family have also taken place in East Asia. The marriage regime here used to be early and universal

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for heterosexual couples, with patrilocal residence as the norm (Cheng and Kolk, 2021). Over the past decades, marriage and childbearing have been delayed to much later ages, and family diversity has increased (Raymo et al., 2015), including emerging trends of cohabitation and a rising share of single-parent families. In particular, after decades of collective effort from many fronts, the landmark ruling of the constitutional court of Taiwan legalized same-sex marriage in 2019. Registration of same-sex partnership is currently also available in a number of prefectures in Japan (Chung, 2021). Marriage equality movements are less visible in China and South Korea, although the Seoul High Court ruled for the first time that same-sex couples should enjoy the same health benefits as heterosexual couples in February 2023 (Yoon, 2023). In addition, adultery has been decriminalized during the latter half of the twentieth century in Japan, China, South Korea, and Taiwan sequentially. With regard to divorce, crude divorce rates have been rising since the 1980s in East Asia (Dommaraju and Jones, 2011), along with more legal reforms to family laws to protect women's rights during the divorce process (Chen, 2016; Yang, 2008). While most East Asian countries allow both consensual and judicial divorces, divorces here are generally fault-based.

These socioeconomic and legal changes have not only made East Asians more affluent and gender egalitarian, they have also altered the life trajectories of women and men. Now more women receive tertiary education and are in gainful employment; marriages are delayed or forgone (Cheng, 2020; Ji, 2015; Jones, 2007; Jones and Yeung, 2014; Raymo et al., 2015); cohabitation has gradually become more prevalent (Cheng, 2020; Raymo et al., 2009; Yu and Xie, 2015); homosexual couples have more freedom to form unions (Tang et al., 2020); and divorce and remarriage have also become more common than before (Nozawa, 2015; Raymo et al., 2015).

27.2 ATTITUDES TOWARDS UNION FORMATION

With the aforementioned social and legal changes as a backdrop, attitudinal and value shifts toward more liberal and diverse views on family formation are key to unraveling the underlying forces of new demographic behaviors. While research on the causes of family change has shown that economic development, democracy, and religious freedom are conducive to attitudinal changes (Inglehart and Welzel, 2005; Thornton, 2001), people in East Asia have also been influenced by an overarching Confucian familism that has a long-lasting impact on union formation. Confucianism puts the relationship between fathers and sons as the primary relationship among the "Five Relationships (五倫)" in human life, to which all other family and social relations, including that between husband and wife, are subordinated (Chen and Li, 2014; Therborn, 2014). This tradition emphasizes the lineage of family through male heirs and keeping a familial collective identity. The patriarchal hierarchy embraced by Confucian familism also assigns women inferior status in the family and grants parents the authority to influence their offspring's decisions over family formation (Kim, 1994). This has indirectly kept cohabitation relatively uncommon and non-marital births rare, as these behaviors go against their restrictive view towards women's autonomy and sexuality and are liable to dishonor one's family (Cheng, 2020; Lesthaeghe, 2022).

These two forces become more conflicting with women's rising status and are manifested differently in each East Asian society. For instance, even though public opinions towards marriage and family values have become more liberal on many fronts, family obligations in the

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form of elderly support remain the norm (Cheng, 2020). However, men and women in East Asia have shown varying levels of approval and attitudinal changes for maternal employment, lone-parenting, cohabitation, son preference, childless marriage, and so on, although men tend to be more conservative than women (Cheng, 2020; Lee, 2017). Overall, Koreans appear to have the most traditional attitudes and Taiwanese and Japanese seem to be relatively more "flexible" in their values, whereas Chinese urbanites can be quite conservative (Cheng, 2020; Lee, 2017). These attitudinal differences are linked to the varying levels of never-married rates by people's late forties in these societies (Cheng, 2020).

When it comes to the driving forces of change, cohort replacement is often key to these attitudinal shifts—younger generations tend to be more accepting of non-traditional gender norms and family values than their older counterparts, although intra-cohort changes across time could vary by social and policy contexts in East Asia (Cheng and Yang, 2021; Kim and Cheung, 2015; Piotrowski et al., 2019). These shifting values and attitudes have led further to more diversified partnering behaviors over the past decades.

27.3 PARTNERSHIP DIVERSITY IN CONTEMPORARY EAST ASIA

27.3.1 Marriage

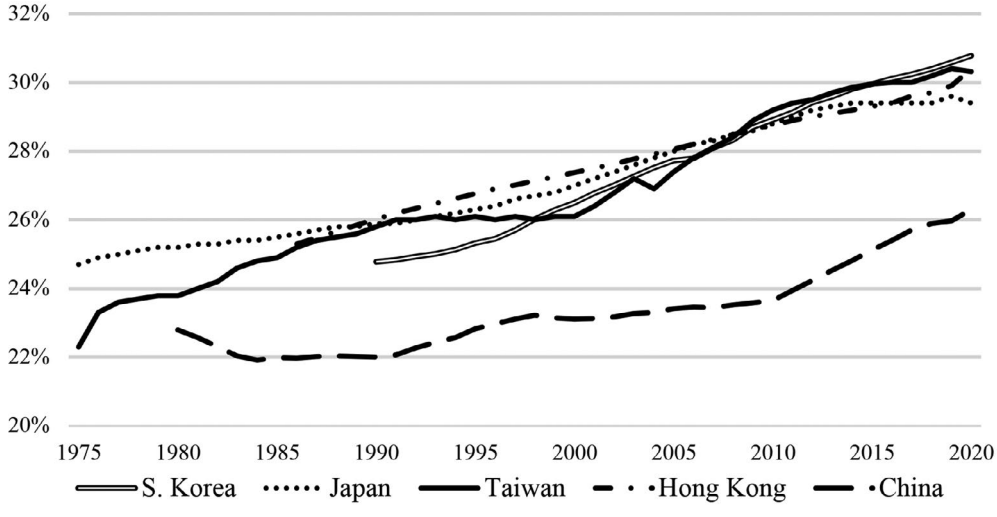
In East Asia, marriages have increasingly been delayed or even forgone, due to extended years of schooling and rising labor force participation among women at prime reproductive ages (Jones et al., 2009). As shown in Figures 27.1 to 27.3, not only have marriages been postponed to later ages (Figure 27.1), but lifelong singlehood has also increased tremendously in this region since 1970, except in China (Figures 27.2 and 27.3). The trajectories of mean age at first marriage among women are quite similar for South Korea, Japan, Taiwan, and Hong Kong, rising rapidly from the mid-twenties in 1990 to the early thirties in 2020, although the pattern of China is quite different. The share of never-married women aged 45–49 has reached 17–18 percent for Japan, Taiwan, and Hong Kong by 2020, whereas the figures observed in South Korea and China were both below 5 percent. In contrast, cross-national variations of the percentages of never-married men were larger than those of unmarried women in 2020, with Japan having the highest share, at 26.5 percent, followed by Taiwan, Hong Kong, and South Korea in the range of 13–22 percent. (See also Chapter 11 (Kislev) for discussions on singlehood in the twenty-first century.)

China has the lowest singlehood rate among women at 4.4 percent, which is likely to be due to its later onset of economic growth than its neighbors and tenacious traditional values. However, recent studies have also suggested that rather than putting forth more measures to balance work and family, there has been a resurgence in emphasizing traditional gender ideology that has increasingly pushed women back into the home (Qin, 2019; Sun and Chen, 2015). Whether the enactment of the three-child policy in 2021 that focuses on advocating marriage and childbearing at an "appropriate age" may create resistance from increasingly well-educated Chinese women and thus further suppress marriage and fertility rates to lower levels remains to be seen. Overall, the patterns observed in China in the past decades still depict a relatively early and universal marriage regime, although recent statistics show that

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the number of registered marriages has nearly halved, from 13.47 million in 2013 to 7.63 million in 2021 (Du, 2022). In addition, notable regional variations in the timing of marriage have been documented, with later entry into marriage more common in urban and eastern China than in other parts of the country (Ji and Yeung, 2014). Hence, marriage patterns in China could become more similar to those found among its neighbors, even though they now seem quite different from the late, non-universal marriage patterns found in the rest of East Asia.

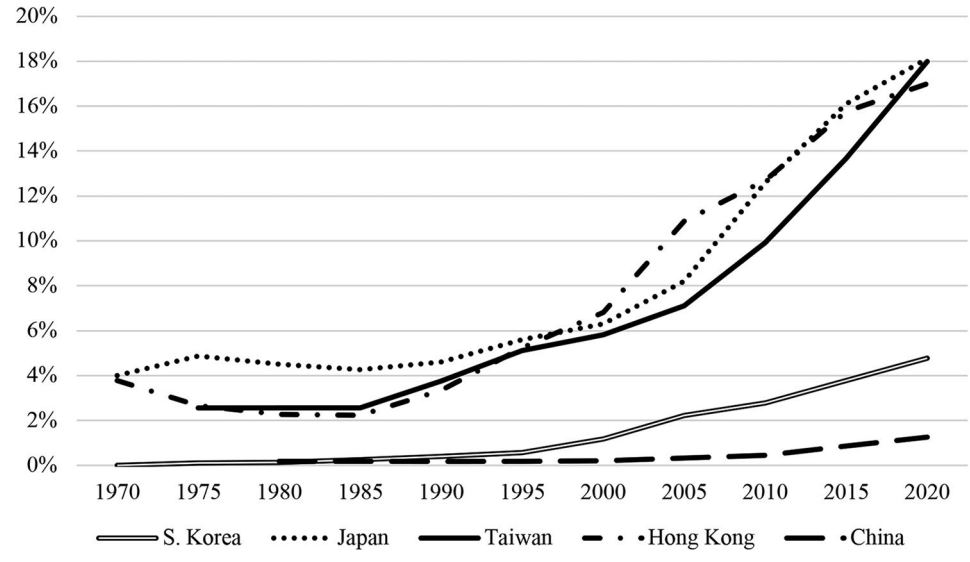
Regarding assortative mating by age and education, increasingly more age hypogamous marriages, in which the wives are older than the husbands, have been observed in East Asia. By 2020, the percentages of marriages where the wives were older than the husbands by two or more years were about 25 percent, 15 percent, and 21 percent in Japan, Taiwan, and Hong Kong (Figure 27.4). Although the latest statistics on age hypogamy for Korea are not available, the possible figure judging from past trends is about 15–20 percent (refer to Figure 27.4). The closing of the mean spousal age gap is due not only to more age homogamy but also to the rise of hypogamous couples and substantial decline of extreme age hypergamy (Cheng and Kolk, 2021).



Source: S. Korea: KOSIS Korean Statistical Information Services; Japan: System of Social and Demographic Statistics A: Population and Households; Taiwan: Department of Household Registration, Ministry of the Interior, Taiwan; Hong Kong: Women and Men in Hong Kong, 2019 Edition; China: National Statistical Bureau (http://www.stats.gov.cn/tjsj/pcsj/rkpc/6rp/html/B0504c.htm).

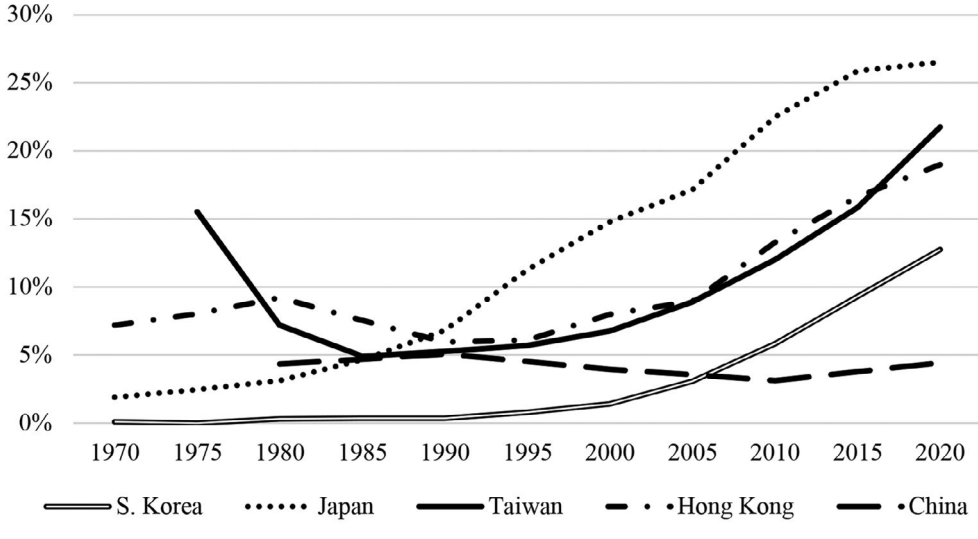
Figure 27.1 Women's mean age at first marriage

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Source: S. Korea: Census data since 1970; Japan: Population Census of Japan; Taiwan: Vital statistics from Statistical Bureau; Hong Kong: Gender statistics section, Census and Statistics Department; China: UN data.

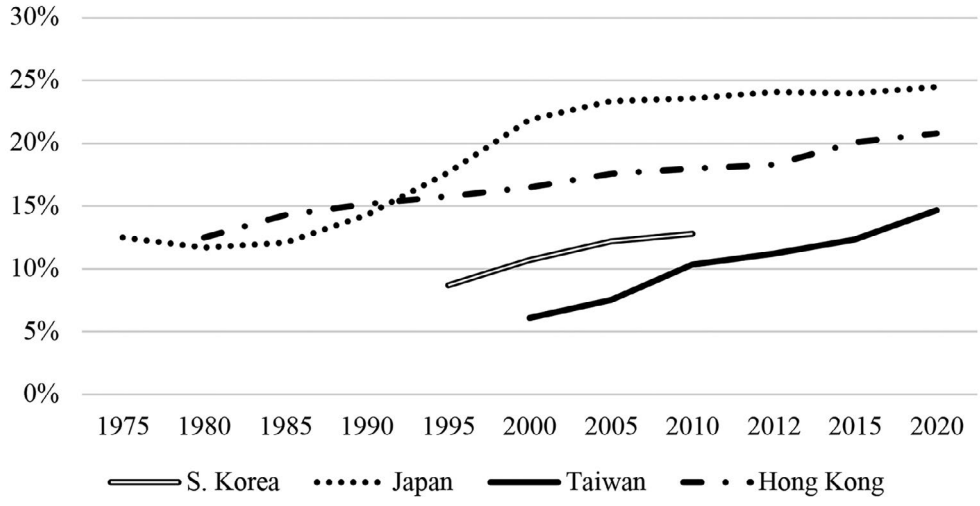
Figure 27.2 Percentage never-married women aged 45–49



Source: See Figure 27.2.

Figure 27.3 Percentage never-married men aged 45–49

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Source: S. Korea: KOSTAT-Marriage Statistics; Japan: Vital statistics in Japan, 2020, Table 9-14; Taiwan: Calculations based on nationwide marriage registration file; Hong Kong: Demographic Trends in Hong Kong, 1986–2016.

Figure 27.4 Proportion of age hypogamous marriages (wives older than husbands for 2+ years), in percentage

Aside from age hypogamy, research has shown an overall decline in educational homogamy between the 1950s and 1990s in Asia (Smits and Park, 2009), with some changes after the 2000s. For instance, educational homogamy increased, whereas educational hypogamy decreased slightly during the period 2000–2010 in Taiwan. The growth in educational homogamy is particularly salient and mainly driven by tertiary-educated men and women (Cheng, 2014). The picture in Korea seems to resemble Taiwan more during the last decades of the twentieth century. That is: educational homogamy has increased, particularly among highly educated Koreans, as well as educational hypogamy (Park and Smits, 2005). In contrast, rising educational hypogamy and declining odds of educational homogamy over time in Japan and Hong Kong have been reported (Fukuda et al., 2020; Uchikoshi and Raymo, 2021; Zhou, 2016). The much stronger expansion of homogamous unions among the highly educated adults in Taiwan and Korea signals a shift towards more social closure that occurs with an overall marriage decline. In China, educational homogamy still dominates more than half of recent first marriages occurring in the 2010s (Hu and Qian, 2019). In particular, tier 1 college graduates are less likely than those graduating from less selective colleges to marry down, and this pattern becomes more salient among women than men after the new millennium (Feng, 2022). (See also Boertien, Chapter 23 for discussions on social stratification and partnership.)

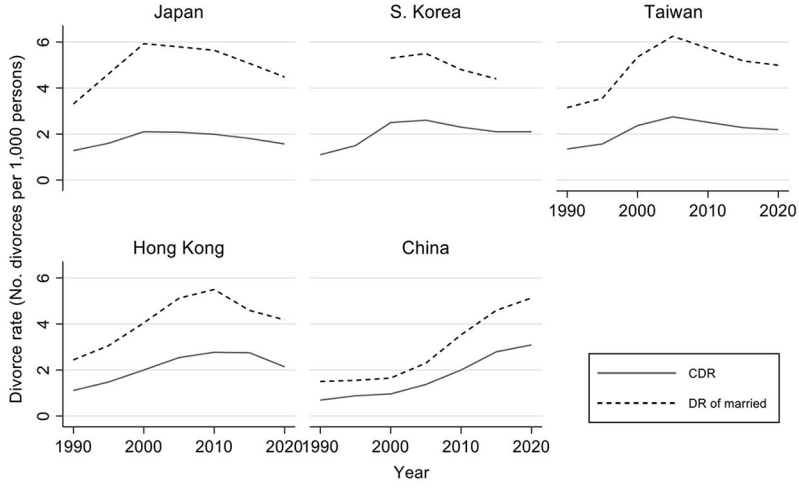
27.3.2 Divorce and Remarriage

Divorce in East Asia has also gone through remarkable changes in the past few decades. Except for China, crude divorce rates (CDR: number of divorces per 1000 persons) increased

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from around 1.2 in 1990 to around 2.5 in 2005 (Figure 27.5). However, since 2005 CDRs in Japan, Korea, Taiwan, and Hong Kong have stabilized, and after 2010 they started to decline. Although Chen and Yip (2018) argued that such a downturn of CDRs in Korea and Taiwan during the years 2000–2010 mainly reflected nuptiality declines rather than reduced divorce risks among the married, more recent data in Figure 27.5 shows that both CDRs and the divorce rates among married populations have continued to decline since 2010, indicating that the long-term divorce surge in these East Asian societies before the 2000s has reached an end. In contrast, China's divorce rates have been rising throughout the past decades, especially after 2000. In 2020, China's CDR topped the East Asia region at 3.1 divorces per 1000 persons, along with 5.1 divorces per 1000 married persons. However, spatial differences have been remarkable in China's rising divorce rates (Chen et al., 2021), which might result from urban–rural inequalities in economic development and gender role modernization during a period of rapid urbanization.

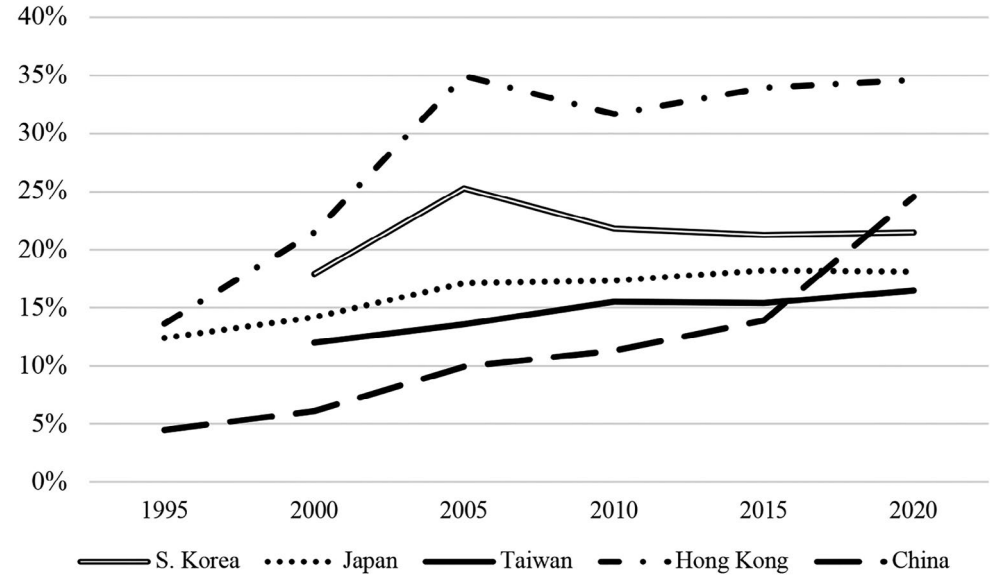
In parallel with the trends of marriage decline and divorce surge, the share of remarriage among all marriages has been on the increase in East Asia. Figure 27.6 indicates that by 2020 Hong Kong had the highest proportion of remarriages in the region, followed by China, Korea, Japan, and Taiwan. When broken down by sex, the prevalence of remarriage among men is generally higher than that of women. Aside from entry into remarriages, many couples might have opted for cohabiting unions, though reliable statistics on post-divorce cohabitation is lacking in most of the countries in East Asia. Research on remarriages in East Asia is a relatively recent endeavor due to data limitations and also because of negative social attitudes towards second unions formed after divorce and separation (Nozawa, 2015).



Source: S. Korea: KOSIS Korean Statistical Information Services; Japan: Population Statistics of Japan, IPSS; Taiwan: Department of Household Registration, Ministry of the Interior, Taiwan; Hong Kong: Women and Men in Hong Kong, 2021; China: China Statistical Yearbook (based on Census data).

Figure 27.5 Trends of crude divorce rates (CDR) and divorce rates (DR) of married people

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Source: S. Korea: KOSIS Korean Statistical Information Services; Japan: Vital statistics of Japan 2020, Table 9-1; Taiwan: Department of Household Registration, Ministry of the Interior, Taiwan; Hong Kong: Demographic trend in Hong Kong 1986–2016; China: National Statistical Bureau (https://data.stats.gov.cn/easyquery.htm?cn=C01&zb=A0P0C&sj=2021).

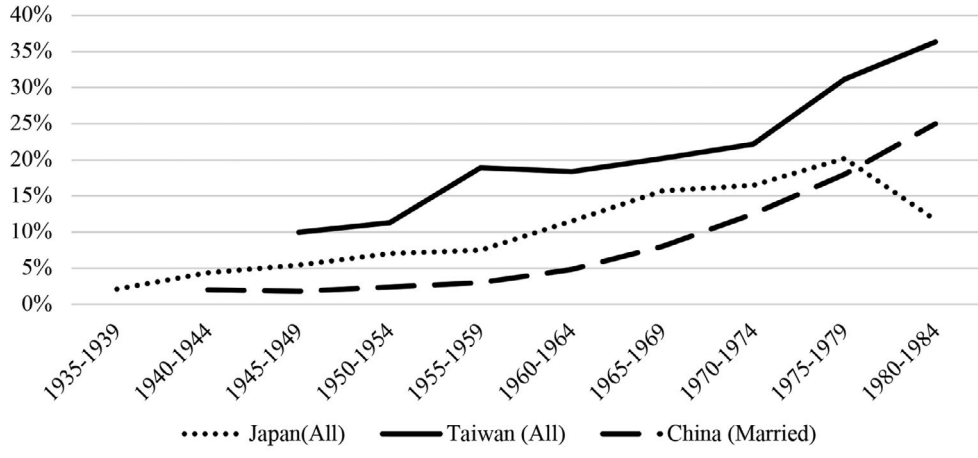
Figure 27.6 Proportion of remarriages among marriages, in percentage

27.3.3 Cohabitation

While cohabitation in East Asia appears to be more common than in the past, its levels are still much lower than those found in Western developed countries. In fact, cohabitation remains a frowned-upon living arrangement among many Asian parents, and their young-adult children who move in with their partners often have to conceal it from their parents. Due to these constraints, statistics on cohabitation are not always readily available in this region. For instance, there seem to be no reliable cohabitation statistics in Hong Kong and Korea (Yoo, 2015) at the population level. In Japan and Taiwan, the period rates of ever experiencing cohabitation in 2004 appear to be 10–15 percent for the former and roughly 20 percent for the latter (Lesthaeghe, 2010; Raymo et al., 2009). From a cohort perspective, Figure 27.7 shows that the prevalence of cohabitation has been rising steadily in Taiwan (Cheng, 2023), Japan (Tsuya, 2006), and China (Yu and Xie, 2015) for women born after 1950. Chinese men and women born in 1980–1984 and residing in metropolitan Shanghai appear to have similar cohabitation rates as those observed in Taiwan, which is much higher than the rest of China (Yu and Xie, 2021).

Although the prevalence of cohabitation is unknown in Hong Kong, a report from the Family Planning Association of Hong Kong (2017) indicates that the share of young adults aged 18 to 27 who agreed with the statement "I will cohabit before marriage" has increased from 13

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Notes: Data for Japan and Taiwan present the estimated cohabitation rates for the whole population, while data for China present the estimated cohabitation rates among those who were married.
Source: Japan: Lesthaeghe (2010); Taiwan: Self-calculations from the 1998–2016 KAP survey data; China: Yu and Xie (2015).

Figure 27.7 Cohabitation rates by birth cohort, in percentage

percent for women and 21 percent for men in 1996 to 24 percent and 34 percent respectively in 2016. As for Korea, public opinions toward cohabitation remain relatively reserved and conservative. Among 253 ever-cohabited men and women aged 18–49 surveyed, nearly 89 percent of them thought that Korean society is not favorable towards unmarried cohabitation (Byoun, 2017). In particular, social stigma against cohabitation is highly gendered in Korea: cohabiting women are perceived negatively because of concerns about female chastity and virginity, whereas cohabiting men are considered as unfilial for not entering into marriage to continue the family lineage (Yoo, 2015). This is likely to be due to the gender norms maintained in Confucian culture (Chen and Li, 2014).

As for the nature of cohabiting unions in these societies, whether individuals began cohabiting with plans to marry is a key indicator. Only about 36 percent of ever-cohabited Taiwanese women aged 20–49 had an intention to marry when they were surveyed in the 2016 KAP, which decreased from nearly 70 percent back in 1998. The comparable figure for Taiwanese men was about 30 percent in 2016 (Cheng, 2023). Among the 253 non-representative Korean ever-cohabited men and women surveyed by KIHASA in 2016, about 74 percent indicated that they planned to register for marriage in the future (Byoun et al., 2021). Moreover, the mean duration of cohabiting unions is relatively short in Taiwan and Korea, lasting roughly 2.5 years in 2016 (Byoun et al., 2021 and authors' calculation based on KAP 2016 in Taiwan); and even shorter in Japan, with an average duration of 21 months for cohorts born in 1954–1984 (Raymo et al., 2009). However, few studies examined how these unions ended.

Despite these increases, cohabitation in East Asia has yet to become a long-term stable union involving children, as observed in the Nordic countries. Cohabiting unions in East Asia serve either as a prelude to marriage or an alternative to singlehood, depending on social context. For instance, cohabitation seems to have gradually become an alternative living

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arrangement in Taiwan and China (Yu and Xie, 2015), while it still serves as a prelude to marriage in Japan and Korea (Byoun et al., 2021; Raymo et al., 2009). However, one thing to note is that the share of men and women lacking relationship experiences has also been rising. The percentages of men and women aged 40–49 reported never having a stable romantic relationship increased from 2.5 percent and 1.8 percent in 2012 to 4.3 percent and 3.4 percent respectively in 2016, based on the KAP surveys in Taiwan. A similar phenomenon has also been noted in Japan: 22 percent of the men in their forties surveyed by government authorities said they had never dated (Teh, 2022).

27.3.4 Same-Sex Marriage and Partnership

In addition to declining marriage rates and rising cohabitation, same-sex families have also become a newly recognized family form, since May 2019 when Taiwan became the first and only country in Asia to legalize same-sex marriage. By the end of 2020, more than 5300 same-sex couples registered for marriage, and slightly more than two-thirds were lesbian unions. While gay marriages are predominantly first marriages for both parties (93.5 percent), lesbian marriages are less likely to be first marriages (80.5 percent) and involve more remarriages. Mean age at marriage is older for gay unions between two men, at 36.7 years than for lesbian unions (33.8 years). When compared to heterosexual marriages, same-sex marriages are slightly more heterogamous, both age- and education-wise in Taiwan (authors' own calculations based on nationwide marriage registration data). Even though same-sex marriages only composed 2 percent of all marriages formed in 2019–2020 and still await more social acceptance, they nonetheless expand partnership diversity in Taiwan.

While same-sex marriage is yet to be legalized in Japan, "partnership certificates" have been issued to homosexual couples in a number of municipalities and prefectures at the sub-national level. This certificate grants some rights to these couples, such as hospital visitation and property rental rights. However, marriage equality bills have never been brought to the parliament, and further legal progress was dashed by the recent ruling of the Osaka court indicating that Japan's ban on same-sex marriage is not unconstitutional (Magramo et al., 2022). As for China and South Korea, same-sex couples face various barriers to civil rights and social tolerance due to political, religious, and cultural reasons (Chase, 2012; Hildebrandt, 2011). For instance, the strong desire to keep the family intact is a critical factor in understanding why Confucian countries tend to express lower acceptance of homosexuality when compared with other similarly developed countries (Adamczyk and Cheng, 2015). For these societies, the prospect of legalizing gay marriage seems unlikely in the foreseeable future.

27.3.5 International and Internal Marriage Migration

International marriage migration from China and Southeastern Asia to Japan, Korea, and Taiwan started to emerge in the late 1980s and became fairly common in the early 2000s. The share of marriages of Japanese nationals with foreign spouses increased from 1.7 percent in 1985 to its peak at 6.1 percent in 2006, and then decreased to 2.9 percent in 2020. In Korea, the share increased from 3.5 percent in 2000 to its peak at 13.5 percent in 2005, and gradually declined to 7.2 percent in 2020. The country with the most prevalent international marriages in East Asia is Taiwan, where the share of marriages between Taiwanese nationals and foreign spouses accounted for 20–31 percent of yearly total marriages from 2000 to 2005 and stayed in

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the range of 13 to 16 percent from 2010 to 2019 (Ministry of the Interior, 2021). A substantial share of these marriages involves brides from mainland China, and the drop in the share of cross-border marriages after the mid-2000s was due to government interventions to deter sham marriages.

It is worth noting that women are more likely than men to migrate for marriage in East Asia, and that the mechanisms behind marriage migration are characterized by gender-power asymmetry and regional economic hierarchy (Jones and Shen, 2008). Specifically, research shows that women from the Asian economic periphery, such as Vietnam, the Philippines, and rural China, are more likely to marry men in the developed and wealthy north (i.e., Japan, Korea, Hong Kong, and Taiwan), while men are less mobile under the constraints of patri-local marriage systems (Chiu and Choi, 2020). For female marriage migrants, the pursuit of a higher standard of living and labor market opportunities are important pull factors triggering marriage migration (Chi, 2018; Cho, 2018; Lu, 2008). Such a phenomenon is usually referred to as Asian women's "marriage-scapes" or "global hypergamy" (Constable, 2005). A similar gender–region hierarchy in marriage migration is also observed among internal marriage migrants in China and China–Hong Kong cross-border marriages, where rural women are more likely to marry urban men with a higher socioeconomic status (Davin, 2008). However, with Asian family systems evolving toward a more gender egalitarian model, the direction between sending and receiving countries and gender components of marriage migration have become more diversified in recent years (Ishii, 2016; Yeung and Mu, 2020). In the past decade, increasingly more marriage migrants have moved from wealthy East Asian countries such as Japan to the developing South-Eastern and South Asian countries, and male marriage migrants are increasing (Ishii, 2016).

Finally, research has shown that female marriage migrants in East Asian societies usually face challenges of social integration (Chang, 2020) and suffer from higher marital instability compared to local women (Chen and Yip, 2020; Choi et al., 2020). These patterns of disadvantage warrant more research attention to cultivating agency and improving wellbeing among international marriage migrants in their receiving societies (Yeung and Mu, 2020).

27.4 ONLINE DATING IN EAST ASIA

Online dating services have burgeoned in East Asia during the past decade. In Japan, 27.2 percent of single Japanese used some sort of marriage-hunting services (*konkatsu*) in 2020, among whom 30.3 percent utilized online dating apps/sites to search for dating partners (RBRI, 2021). In China, more than 50 million individuals used online matchmaking or casual dating services in 2021 (Statista, 2022). While the total population dating online is increasing in this region, many users remain skeptical about the seriousness of a relationship developed online and are vigilant regarding the risks of fraud (Low et al., 2022). In South Korea in 2021, for example, fewer than half of online dating users would meet up offline with a stranger matched online, and only around 30 percent eventually developed a romantic relationship via online dating (GMOR, 2021).

The prevalence of online dating has the potential to alter conventional assortative mating patterns and contribute to higher diversity of the partnering processes (see also Potarca, Chapter 12 for discussions on online dating). However, while this might be the case for online initiated couples in the US (Potarca, 2017; Thomas, 2019), empirical studies in East Asia

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usually report the opposite. For example, high income and educational level remain important characteristics for men to match with a female partner online in Japan (Brinton et al., 2021) and in China (Ong, 2016; Xia et al., 2014; Xiao and Qian, 2020). In South Korea, Lee (2016) found that online dating increased homogamy in terms of educational level, age, and marital histories. These findings imply that the increased efficiency in profile screening and accuracy in matching via online dating services might reinforce, rather than alter, the conventional pattern of assortative mating by universally valued traits in East Asian countries.

27.5 THE FUTURE OF PARTNERSHIP IN EAST ASIA

As East Asia becomes more modernized and affluent, later and less marriage has become the new reality, along with increasing partnership diversity. While continued development, educational expansion, and advanced information technology could prompt further behavioral convergence in East Asia towards the Western world (Therborn, 2014), the pervasive impact brought by Confucian familism might work against such a shift (Chen and Li, 2014). For example, although some societies may be ready for the legal recognition of same-sex unions, as in Taiwan, opposition to same-sex marriage is likely to remain strong in countries sharing Confucian family values due to the emphasis on continuing the family line (Adamczyk and Cheng, 2015). Another phenomenon worth noting is that non-marital births have remained low, in the range of 1–4 percent in East Asia, except in Hong Kong (Cheng, 2020). Despite this, the growth of lifelong singlehood, cohabitation, divorce, and remarriage is changing the traditional family model and partnership dynamics. More research is needed to unpack people's partnering behaviors when they are not married; knowledge about how adults adjust to singlehood or enter non-marital unions is also gaining importance. Finally, reforms in family legal systems, changing patterns of international marriages, and the emergence of online dating will play an increasingly crucial role in shaping the future development of partnership patterns in East Asia. These changes will further affect how the "family" is structured and defined, as well as individuals' evolving partnering experiences over the life course.

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28. Partnering in Latin America

Pilar Wiegand-Cruz

Partnership formation in Latin America has experienced significant changes in the last five decades. The sharp increase in cohabiting unions and childbearing within cohabitation has been one of the most salient changes. Latin Americans are now more likely than ever to choose nonmarital cohabitation as their first type of union, to have cohabited at some point during their lives, and to have their first child within cohabitation (Laplante et al., 2016; Wiegand-Cruz, 2023). Marriage, in contrast, has increasingly lost importance in individuals' lives.

The increasing levels of nonmarital cohabitation have drawn ample attention among scholars. In the last 25 years, considerable research has focused on describing trends and patterns in union formation. This includes finding the reasons underlying the general rise of nonmarital cohabitation in Latin America and explaining why cohabitation levels diverge significantly within the region. This chapter will review recent research on cohabiting unions. First, I present trends and patterns in nonmarital cohabitation and marriage. Next, I summarize the findings of a recent study attempting to understand the uniqueness of Latin American partnering patterns. Finally, I discuss current legal frameworks regularizing cohabiting unions in Latin America.

28.1 RECENT TRENDS AND PATTERNS

To provide a synthetic view of recent research on partnerships in Latin America, I examine studies that have considered at least one of the 17 countries in the region: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela. Research has documented recent partnership trends along three dimensions: the increasing prevalence of nonmarital cohabitation among individuals in a partnership; the changing relative share of different types of first union and union transitions; and more generally, the types of first conjugal arrangements and their relationship with childbearing.

28.1.1 The Prevalence of Cohabiting Unions

Between the 1970s and 2000s, the percentage of cohabiting unions increased significantly, especially among countries that had historically presented low levels.

Tables 28.1a–28.1h present the share of cohabitation among all unions, for women aged 25–29 and 30–34, from the 1970s to the 2010s. The results are organized in four Latin American regions linked by their geographical proximity and historical similarity. Central America, composed of Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, and Panama; Tropical Latin America, comprising Brazil and Paraguay; the Andean Region, formed by Bolivia, Colombia, Ecuador, Peru, and Venezuela, and the Southern Cone, including Argentina, Chile, and Uruguay.[1]

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In five decades, on average, the percentage of women in a cohabiting union has almost tripled among those aged 25–29 (from 27 percent in the 1970s to 68 percent in the 2010s, results not shown) and doubled among those aged 30–34 (from 25 percent in the 1970s to 49 percent in the 2010s, results not shown). Several changes are notable for the 1970–2010 period left among women aged 25–29 (part of Tables 28.1a–28.1h). For one, in most countries, the share of cohabiting unions in this age group increased by 20 percentage points or more. Furthermore, in the 2010s, marital unions were more frequent than cohabiting unions in only four countries. Within those, Costa Rica and Ecuador are very close to 50 percent. The predominance of cohabitation over marriage is a recent change, since only a decade before (in the 2000s), marital unions were more prevalent in most countries (nine out of 17). Moreover, the Southern Cone became the region with the largest share of cohabiting unions, with almost 70 percent of women aged 25–29 cohabiting among all women in unions. These results are surprising, considering that the Southern Cone had the lowest levels of cohabiting unions, averaging 7 percent, in the 1970s. Central America is the region with the lowest rate of increase in cohabitation between 1970 and 2010. Only Guatemala's cohabitation levels decreased. It is noteworthy that Central America already exhibited high levels of cohabitation at the outset of the observed period in the 1970s.

Furthermore, in all countries, women aged 25–29 had the same or higher levels of cohabitation than women aged 30–34 (Tables 28.1a–28.1h). Over time, the difference in the probability of being in a cohabiting union for women aged 24–29 and 30–34 has increased. The discrepancy was slight in the 1970s and 1980s, about one to three percentage points, but it rose in the 1990s. Conversely, in 2010, Argentina, Brazil, Colombia, Peru, and Uruguay experienced a slowdown and even a reversal in the number of older cohabiting unions compared to younger ones.

Table 28.1a *Percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Central America, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Costa Rica	16.8	19.5	–	32.3	48.1	31.3
El Salvador	–	–	53.1	53.7	58.5	5.4[a]
Guatemala	53.1	44.8	36.8	37.3	44.2	−9.0
Honduras	58.8	51.4	–	55.8	67.2	8.4
Mexico	15.3	–	17.6	22.2	40.0	24.6
Nicaragua	42.8	–	55.1	55.4	55.2	12.5
Panama	58.9	52.6	53.3	62.7	74.2	15.4

Notes: a. 2010–1990 difference. Table comparing the percentage of cohabiting unions among women aged 25–29 in Latin America, Central America, from 1970 to 2010.

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Table 28.1b *Percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Andean Region, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Bolivia	–	–	–	34.7	51.3	16.6[a]
Colombia	19.2	33.0	49.0	65.2	73.8	54.5
Ecuador	27.2	29.0	29.9	36.9	47.7	20.5
Peru	–	–	43.1	70.0	73.0	29.9[b]
Venezuela	30.6	32.6	36.4	51.6	–	20.6[c]

Notes: a. 2010–2000 difference; b. 2010–1990 difference; c. 2000–1970 difference. Table comparing the percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Andean Region, from 1970 to 2010.

Table 28.1c *Percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Tropical Latin America, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Brazil	7.5	12.8	21.9	39.4	51.0	43.5
Paraguay	28.0	25.3	27.7	38.9	66.9	38.9

Notes: Table comparing the percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Tropical Latin America, from 1970 to 2010.

Table 28.1d *Percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Southern Cone, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Argentina	11.0	13.0	22.4	41.3	67.4	56.4
Chile	4.6	6.7	11.4	24.6	70.2	65.6
Uruguay	9.6	14.1	23.5	53.8	70.7	61.1

Notes: Table comparing the percentage of cohabiting unions among all unions, women aged 25–29 in Latin America, Southern Cone, from 1970 to 2010.

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Table 28.1e *Percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Central America, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Costa Rica	16.1	17.3	–	26.1	37.5	21.5
El Salvador	–	–	48.1	44.4	45.9	−2.2[a]
Guatemala	51.3	43.7	35.6	33.5	35.9	−15.4
Honduras	55.4	49.0	–	49.0	57.8	2.4
Mexico	14.2	–	14.9	18.4	30.6	16.4
Nicaragua	36.1	–	49.5	49.2	47.1	11.0
Panama	53.8	50.9	49.1	54.2	62.8	9.1

Notes: a. 2010–1990 difference. Table comparing the percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Central America, from 1970 to 2010.

Table 28.1f *Percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Andean Region, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Bolivia	–	–	–	23.4	37.1	12.7[a]
Colombia	17.8	28.0	41.8	56.3	65.7	47.9
Ecuador	25.6	26.4	27.2	32.3	40.1	14.4
Peru	–	–	31.7	56.2	59.5	27.8[b]
Venezuela	30.9	32.6	34.3	45.1	–	14.2[c]

Notes: a. 2010–2000 difference; b. 2010–1990 difference; c. 2000–1990 difference. Table comparing the percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Andean Region, from 1970 to 2010.

Table 28.1g *Percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Andean Region, 1970–2010*

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Brazil	7.1	11.6	18.7	31.6	43.5	36.3
Paraguay	24.3	22.4	23.2	30.8	54.6	30.3

Notes: Table comparing the percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Andean Region, from 1970 to 2010.

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Table 28.1h Percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Southern Cone, 1970–2010

Country	1970	1980	1990	2000	2010	Diff 2010–1970
Argentina	9.9	11.5	19.4	28.7	57	47.1
Chile	4.6	6.5	10.9	18.2	56.8	52.2
Uruguay	7.7	13.2	18.7	36.9	53.6	45.9

Notes: Table comparing the percentage of cohabiting unions among all unions, women aged 30–34 in Latin America, Southern Cone, from 1970 to 2010.
Source: All tables prepared by the author based on census and national survey data.

The difference in the share of cohabitation of these two age groups may be due to two complementary factors: first, younger cohorts are more likely to form cohabiting unions than older cohorts. Secondly, and based on recent research, some of the unions that start as cohabitation later become marriages (Laplante and Street, 2009; Pérez Amador, 2016; Quilodrán Salgado and Arrieta-Arrieta, 2022; Saavedra, 2016).

28.1.2 First Union and Union Transitions

The expansion of cohabiting unions is mainly explained by the increasing probability that couples cohabit rather than marry when establishing their first coresidential union together with the decreasing likelihood of converting these unions in marriage later in life.

Grace and Sweeney (2014) investigated the transition to the first union for three Central American countries. They aimed to examine whether the magnitude and timing of the transition differ between cohabitation and marriage among women aged 15–24. Their results show that in Guatemala, the probability of transition to cohabitation or marriage is similar in magnitude and pattern. Notably, Guatemalan women transitioning to cohabitation are younger than those transitioning to marriage. In contrast, in Honduras and Nicaragua, entering a cohabiting union is significantly more likely than entering a marriage, regardless of women's age.

Laplante and Street (2009) studied cohabitation in Latin America. The aim was to examine the sociodemographic factors associated with the formation of nonmarital cohabitation and the change from a cohabiting union into a marriage in Argentina. Their results show that nonmarital cohabitation is more frequent among young people who are probably entering their first union. The results also revealed an inverted U-shaped relationship between women's age and transition to marriage, in which transition to marriage was highest among women aged 33–35 and then gradually reduced.

Pérez Amador (2016) examines the continuity and change of cohabitation in Mexico. Her results indicate that the probability of entering and staying in a cohabiting union increased among women from the 1975–84 birth cohort in comparison with women born earlier. Additionally, the transition from cohabitation to marriage decreased among younger cohorts. Her results also suggest that women of younger cohorts have more unstable unions that their older counterparts, independently of the type of union (cohabitation or marriage), showing that the risk of union dissolution is higher among younger than older cohorts.

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Wiegand-Cruz (2023) illustrates the changes in the type of first union over time. Comparing women born in the 1950s with those born in the 1970s, her results suggest that all countries had a decline in the proportion of women whose first union was marriage, with a simultaneous increase in cohabitation in these cases. Markedly, this trend varies considerably depending on the country. In Colombia, Nicaragua, and Peru, more than half of women have entered a cohabiting union before the age of 35, while only 33 percent and 23 percent have done so in Bolivia and Brazil respectively. Recent trends suggest the universality of cohabitation as the first union among younger cohorts.

The exploration of higher-order partnerships in Latin America has been constrained by the scarcity of suitable data. Fostik et al. (2023) address this gap by investigating the relationship between union instability and cumulative fertility among women who have had previous partnerships, spanning various regions in Europe and the Americas, shedding light on patterns in higher-order unions. Their findings suggest that Latin American women are generally less likely to repartner than their Western-Northern European or North American counterparts. However, there is a noteworthy exception in Colombia, where women are two times more likely to enter their second or subsequent union by the age of 40 than women in Mexico and Uruguay (25 percent in Colombia compared to 12 percent in Mexico and Uruguay).

28.1.3 Conjugal Union and Childbearing

Childbearing within cohabitation has increased across Latin America over the past few decades. Castro-Martín et al. (2011) estimate the percentage of children 11 months or younger born to married, cohabiting, and single mothers. Their results show that nonmarital fertility significantly increased from the 1970s to the 2000s. On average, the percentage of children born in cohabiting unions (from 17 percent to 39 percent) and single mothers (7 percent to 15 percent) has more than doubled in the last 40 years, showing that more than half of the children were born outside marriage in Latin America in the 2000s. In updated estimations of the 2010s across all countries, marital births account for less than half of total births. In Panama and Colombia, fewer than one in five children were born in marriage. Meanwhile, in all countries, births within cohabitation accounted for 40 percent or more of all births, reaching 60 percent or more in Colombia, Honduras, Panama, and Peru (Wiegand-Cruz, 2025).

Studies that analyze the fertility patterns of women in different unions shed light on the fertility of women in cohabiting unions and their differences and similarities to marital fertility. Laplante et al. (2015) estimate age-specific fertility rates (ASFR) and the total fertility rate (TFR) by union type. In general, the results show that there has been a significant decrease in the number of births per woman in all countries. When comparing fertility by union type, the results for ASFR suggest that women in marital and cohabiting unions have very similar fertility patterns. In contrast, TFR is significantly higher among cohabiting than among married women (except in a few countries).

Laplante et al.'s (2015) findings also indicate that in most Latin American countries, the rate of decrease in TFR has been faster among married than among cohabiting women. Consequently, the TFR discrepancy between married and cohabiting women has narrowed over time. Finally, the authors conclude that since the 1980s in Latin America, women's fertility patterns have depended on their age and whether they live in a conjugal relationship, not on the level of formalization of their unions.

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Studies focusing on children's family structure in Latin America are scarcer and outdated (Castro-Martín et al., 2011; Lloyd and Desai, 1992; Richter, 1988). Richter (1988) studies transitions in children's living arrangements in Colombia and Mexico by analyzing the changes in their mothers' union status. They showed that among children born within a union, 16 percent experienced disruption at 15 years of age in Mexico and 25 percent in Colombia. The results also indicate that most children born outside a union over time transition to a two-parent family (married or cohabiting). Yet, a relevant proportion of children had to wait several years before experiencing that transition. Further results indicated that children born within cohabitation were significantly more likely to experience parental separation than children born within marriage.

Lloyd and Desai (1992) estimate the proportion of years that a child has lived in a marital situation, a cohabitational context, a single-mother family, or apart from the mother. Their results show that in Colombia, 13 percent of childhood years are spent in single-mother families, while this percentage is lower than 10 percent for Brazil, Ecuador, and Peru. They also show that the proportion of children living in a two-parent married or cohabiting family varied greatly between Latin American countries.

28.2 EXPLANATIONS FOR CHANGING PATTERNS IN CONJUGAL UNIONS

Multiple situations facilitated the development of cohabitation and 'illegitimacy' in Latin America. For one, many pre-Hispanic tribes and civilizations practiced polygamy, established trial marriages, and allowed divorce among married couples. In addition to that, during colonial rule, the highly inconsistent official position of the Church and the Crown regarding interracial marriage contributed to the practice of cohabitating unions. When interracial marriage was rare, the Church supported the spouse's choice (free will) over claims of race, class, and status diversity. However, at the end of the eighteenth century, the Crown changed its position, establishing new barriers to avoid increasing intermarriage. Marriage was also difficult due to the considerable economic cost, the lack of priests to enact the ceremony (especially in rural areas), and the required marriage paperwork. Finally, the workforce of the colonial economy was mainly based on a floating male population, which tended to establish temporary families, leaving unfathered children behind when new job opportunities appeared, which were often far from home.

During the first decades of colonial rule, the scarcity of European women encouraged interracial marriages. European conquerors were especially prone to marry noble Indigenous women, and the offspring of these unions, 'mestizos', had the right to inherit their parents' wealth. Yet the rapid surge of mestizos in the New World resulted from cohabitation and, frequently, rape. During the sixteenth century, the mestizo was assimilated into the world of either the mother or the father. Only when it became a relevant proportion of the population and was considered a distinctive caste did the Crown begin to worry about it and its family arrangements (Malicote and Hartman, 1984).

Sociodemographic factors became increasingly important in the choice of spouse. Race became an important social marker as Latin America developed into a more organized society. European males more frequently preferred to marry a European woman, and less often, they chose mestizo women with backgrounds of European nobility. In contrast, the acceptance of

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mestizo women as potential spouses became increasingly lower. With time, marriage became highly endogamous (Esteve et al., 2012; McCaa, 1984; Nazzari, 1996; Therborn, 2004).

Overall, the social panorama encouraged the development of cohabitation as a widespread and accepted form of living arrangement. European white males' position of power, the easy availability of indigenous women, and the widespread acceptance of concubinage fostered the establishment of informal living arrangements between European males and native women. The arrival of the nineteenth century brought about the weakening of Iberian control over American colonies. After three centuries of colonial rule, in which Spanish and Portuguese colonial powers controlled the whole of Latin America, all the countries in the region achieved independence relatively quickly.

Political independence[2] profoundly changed the approach the states adopted regarding family formation. During the colonial period, cohabiting unions, single motherhood, and non-marital births were prominent in the region. The authorities that emerged during the Republic aimed to remove these family patterns (Bravo, 2010; Gonzalbo Aizpuru, 2010; Sloan, 2008). The colonial family model was a product of a society that had not reached the expected levels of progress and civilization. The upper classes imitated the Western Christian family model. The middle and lower classes persisted in a family model centered on mothers and absent fathers (Cicerchia, 1998; Montecino, 1996; Potthast-Jutkeit, 2010). Hence, marriage and cohabitation coexisted as two legitimate and deeply established conjugal arrangements. Scholars have called this pattern the 'Dual Nuptiality System' (Castro-Martín, 2002), the 'mestizo family model' (Potthast-Jutkeit, 1997), and 'the duality of creole society' (Therborn, 2004). The choice of cohabitation over marriage was strongly determined by the combination of the couple's sociodemographic characteristics, primarily class and race. Among the lower classes, unions tended to be racially mixed, unstable, and informal, with high levels of unmarried childbearing, female-headed households, and male absence – all characteristics that persist in Latin America. A variant of the Western European Christian family tradition developed among European descendants: women were expected to remain celibate until marriage, which was considered a commitment for life (divorce was prohibited), and the family was organized according to patriarchal rule.

Several developments between the second half of the nineteenth and the first half of the twentieth century explain the rise of marriage in the region. Notably, the abolition of slavery and economic development. At the end of the nineteenth century in Brazil, Venezuela, and Colombia the abolition of slavery meant that African Latin Americans were free to marry people outside their plantation and of different racial backgrounds (Hensel, 2007; Holt, 2005). Several countries in Latin America experienced an economic boom, mainly due to the region's integration with the international economy. Subsequently, some countries experienced massive European immigration, mainly to Brazil, Argentina, Uruguay, and Peru and, to a lesser extent, to Venezuela and Chile, bringing with them the Western Christian family model, considerably increasing the number of people publicly living with Christian values. With European immigration, some countries saw a significant change in racial structure and an increase in marriage (Sanchez-Albornoz, 2014; Therborn, 2004).

Internal factors also comprised critical political and institutional changes that developed in most countries after independence, vital for the economic prosperity that originated in the region. These consisted of the abolition of slavery, increasing internal labor mobility, the creation of a land market, the establishment of functional taxation systems and the construction of new infrastructure, such as ports and railway lines (Lewis, 1986). Political structures

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were consolidated, improving institutional stability and reducing domestic and international conflicts. That said, the degree of stability varied considerably between countries (Bértola and Ocampo, 2013).

The economic boom in the region at the beginning of the twentieth century caused an increase in people's income, which in turn may have contributed to their increasing probability of marrying. However, economic growth developed heterogeneously in Latin America in terms of timing (earlier or later) and force (stronger or weaker) (Bértola and Ocampo, 2013; Charlip and Burns, 2017). The most economically successful countries, such as Brazil, Chile, and Uruguay, registered the highest nuptiality rates in the region. Less economically prosperous countries, such as Colombia and Venezuela, reported slight increases in their marriage rates. Still, in most Central American countries (except for Costa Rica), nuptiality rates remained unchanged (Therborn, 2004).

Finally, some countries, such as Chile (Valdes, 2009) and Mexico (McCaa, 1994), introduced family policies to promote marriage. In the case of Chile, the decrease in cohabitation was related to the implementation of policies and administrative measures from 1924 to 1973 aimed at formalizing unmarried cohabitation. Marriage was promoted by implementing labor laws benefiting two-parent married families. In the mid-twentieth century, labor legislation expanded, including family allowances for all male workers, including their wives and children (Valdés, 2007). During the 1940s, an official campaign was organized in Mexico to legalize cohabiting unions and religious marriages. The government deployed civil officials to marry several couples simultaneously (Tuñón, 1997). A second campaign was carried out during the 1970s, in which the aim was not only to legalize cohabitation and religious marriages but also to register all children who were not officially enrolled in the Civil Registry. The combination of massive European migration, regional economic boom, and the implementation of family legal regulations and policies promoting marriage produced heterogeneous trends in family arrangements across the continent. For example, most Central American countries, except Costa Rica (with high European immigration), maintained historically high cohabitation and nonmarital fertility percentages. In contrast, Brazil, Mexico, and the Southern Cone (Chile, Argentina, and Uruguay) reduced cohabitation and unmarried fertility levels (Therborn, 2004).

Despite the governmental support for marriage, marriage rates declined in the last decades of the twentieth century as cohabitation and nonmarital childbearing increased. In the 1990s and early 2000s, most countries in the region had reached unprecedentedly high levels of cohabitation and nonmarital fertility. These recent phenomena are composed of both traditional behaviors and 'modern' reasons for cohabitation, similar to those that led to its development in most Western countries.

28.2.1 Traditional and Modern Cohabiting Unions

In addition to describing recent trends in nuptiality patterns, research has attempted to explain the drivers underlying the 'Cohabitation Boom' in Latin America. These drivers commonly revolve around the influence of socio-economic conditions, ideational shifts, or a combination of both, serving as central mechanisms accounting for the increasing prevalence of cohabiting unions. Three findings recur in the literature.

First, cohabiting unions have historically been predominant among economically vulnerable and least educated groups, to the extent that several authors have called cohabitation in Latin America 'poor people's marriage' (Castro-Martín, 2001; García and Rojas, 2004, for

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example). Cohabitation is argued to be an essential part of the 'culture of poverty' in Latin America, often used as a strategy to cope with economic hardship and understood as a family pattern that has a different set of norms, values and attitudes, including a general disregard for formalizing unions (Castro-Martín et al., 2011; García and Rojas, 2004). The expansion of cohabitation among lower classes is partially explained by the increasing levels of social inequality developed in the region (Esteve et al., 2022; Ramm and Salinas, 2019). Low-educated individuals face more challenges when entering the labor market and have lower, more unstable earnings and limited or no social security compared to highly educated individuals (García and Rojas, 2004; Rodríguez Vignoli, 2005). Some literature distinguishes 'consensual unions' and cohabiting unions as distinct types of conjugal arrangements, despite both referring to unmarried coresidential unions (Thomson, 2023). Consensual unions are understood to be part of the historical Latin American nuptiality pattern. Meanwhile, cohabitation refers to recent union patterns developed in Europe and Anglo-Saxon countries since the 1970s.

The second finding refers to the increasing prevalence of cohabitation among individuals of all educational levels. These studies use education as a proxy to measure socioeconomic status. Furthermore, the highest increases have occurred among university educated individuals, partially because they started with a lower baseline. Thirdly, the negative educational gradient remains, despite the considerable increase in cohabitation among highly educated individuals. Nevertheless, the difference between the high- and low-educated has reduced significantly, particularly among young individuals (Castro-Martín and Dominguez-Rodriguez, 2016; Esteve et al., 2012; 2016). Overall, research suggests that there is a tendency towards convergence among young individuals and that in the short term, the probability of being in a cohabiting union will be the same, regardless of the educational attainment. However, research has also shown that the transition from cohabitation to marriage is more frequent among higher than lower educated women, indicating that the socioeconomic gradient in union formation is now evident in the pattern where cohabitation has evolved into a preliminary stage before marriage for highly educated individuals, whereas for those with lower education, it tends to be a more enduring family arrangement (Laplante and Street, 2009; Pérez Amador, 2016; Wiegand-Cruz, 2025).

The third set of recurrent findings concern childbearing within cohabitation. In Latin America, cohabitation has traditionally been associated with childbearing. As cohabitation has historically been associated with poverty, nonmarital childbearing in Latin America has been a common feature for people with low socioeconomic status. Recent research shows that the negative educational gradient of nonmarital childbearing remains in place; results indicate that low-educated women are more likely to have children within cohabiting unions than middle- and highly educated women. This difference has become less steep over time (Castro-Martín et al., 2011). The study by Laplante et al. (2015) further indicates that university-educated women have the lowest fertility in all countries, regardless of conjugal union type. No statistically significant differences were found among university-educated cohabiting and married women in six of the 11 countries they studied.

Figures 28.1a–28.1f presents the percentage of cohabiting unions among all partnerships for women aged 25–29 according to educational attainment, country, and decade (plus respective confidence intervals). Three categories were created for educational attainment: tertiary (high); complete secondary (medium); and primary or lower (low).

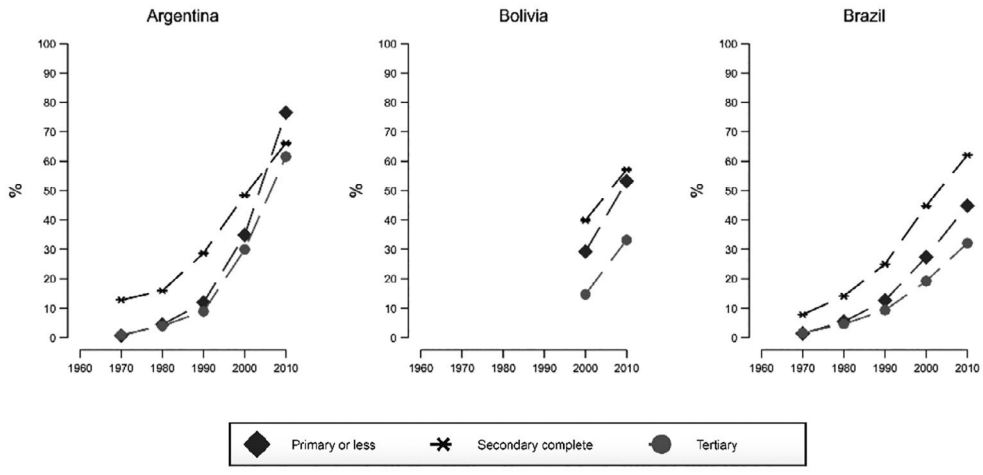
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The results for the 2010s corroborate the prediction made by previous research concerning the reduction of the negative educational gradient. In nine out of 16 countries, there was a decrease in the gap between highly and low-educated women in their cohabitation levels. Only in Brazil, Mexico, and Peru is an increase observed. Meanwhile, in Costa Rica, Ecuador, Honduras, and Uruguay, the disparity was the same as in the previous period (1990–2000). The graphs also show a convergence in the choice of conjugal union between educational groups in three countries: Chile, Colombia and Argentina. The results for Chile are the clearest: in the 2010s, being in a cohabiting union was equally likely for all women aged 25–29, regardless of their educational level. Equally, no statistically significant differences exist between middle- and highly educated women in Colombia and Argentina (results not shown). Despite the convergence trend across all educational groups, except for Chile, the share of cohabiting unions is significantly higher among low-educated than highly educated women, and the difference is 5 percentage points or more (results not shown), indicating that the negative educational gradient remains in place in the region.

Multiple scholars claim that the increase in cohabiting unions and childbearing within cohabitation across all social strata reflects changes in the social meaning of cohabitation (Covre-Sussai et al., 2015; Esteve et al., 2022; Salinas, 2016). They argue that recent trends in cohabitation occur in the context of educational expansion, shifts to postmodern values (secularism, individualism, and self-realization), and economic and political female emancipation (including sexual and reproductive autonomy), suggested by the second demographic transition framework. However, among low-educated individuals, cohabitation reflects the persistence of traditional 'consensual unions', characterized by economic restrictions, low male responsibility, high fertility, and union instability. Instead, for highly educated people, cohabitation is driven by ideational changes, as described by the Second Demographic Transition (SDT) (Esteve et al., 2012; Lesthaeghe and Esteve, 2016).

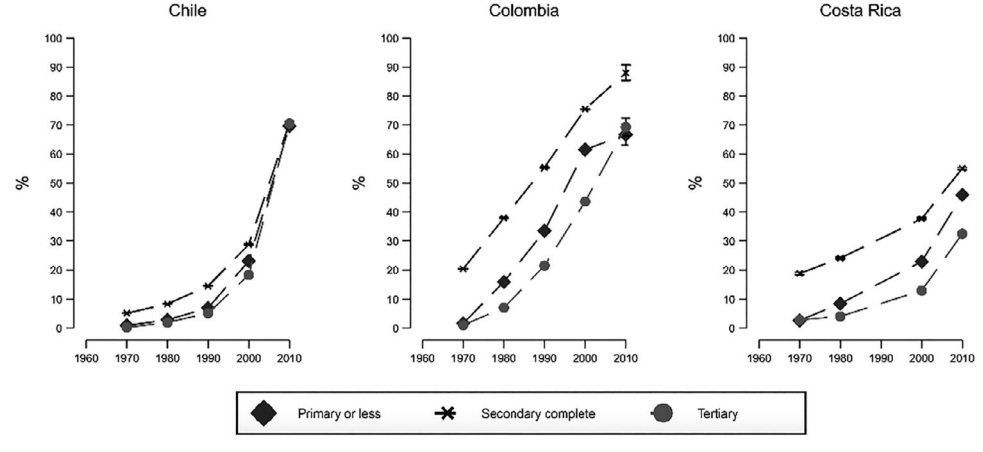
The debate about the extent to which we should understand the increase of cohabiting unions as a persistence of the historical dual nuptiality system and the extent to which it is part of the development of the SDT in the continent has yet to be resolved. In general, the literature agrees that it is crucial to consider the region's historical legacy to understand the complexity of its nuptiality patterns (Esteve et al., 2022).

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Source: Prepared by the authors based on census and national survey data.

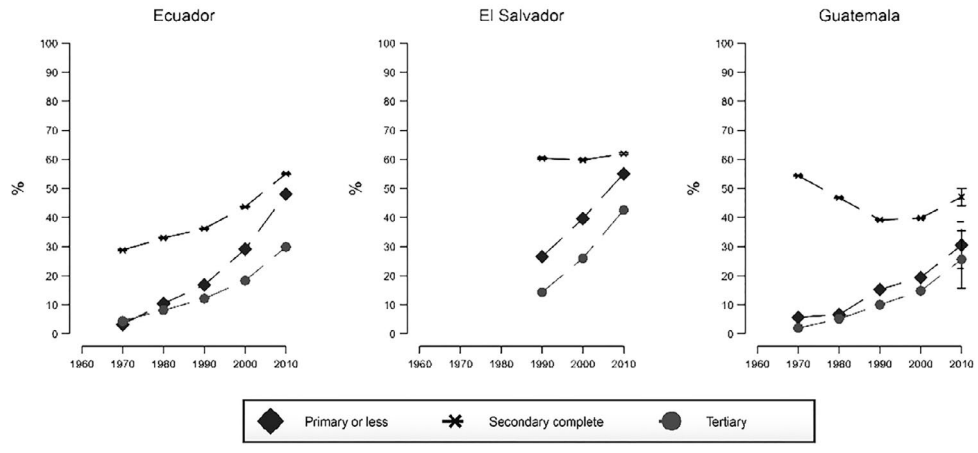
Figure 28.1a Share of cohabiting unions among all unions of women 25–29 by country, education, and decade – Argentina, Bolivia and Brazil



Source: Prepared by the authors based on census and national survey data.

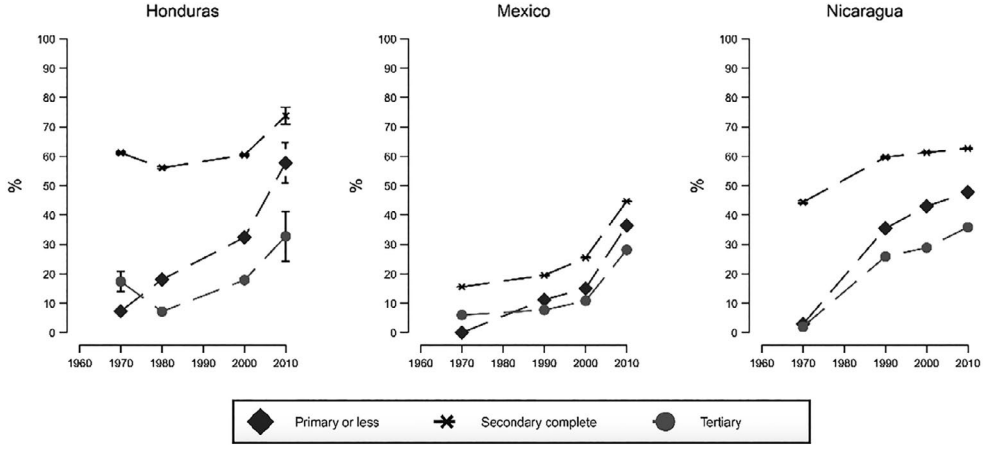
Figure 28.1b Share of cohabiting unions among all unions of women 25–29 by country, education, and decade – Chile, Colombia and Costa Rica

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Source: Prepared by the authors based on census and national survey data.

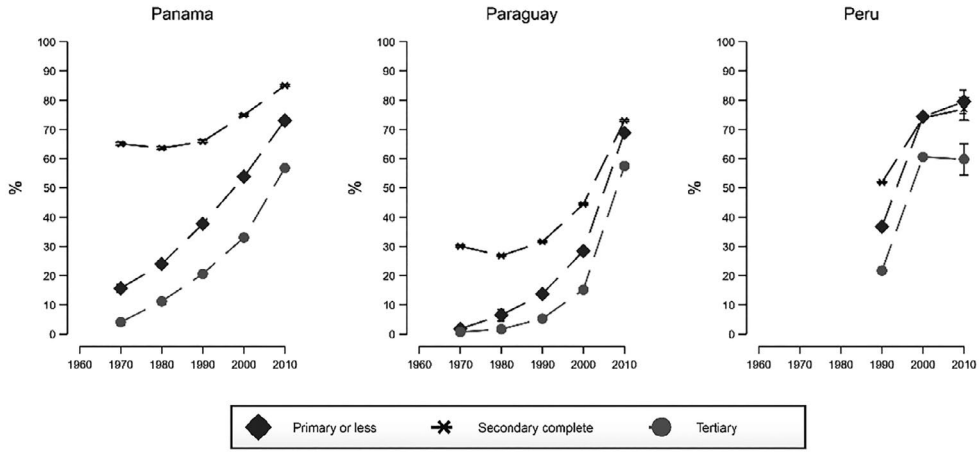
Figure 28.1c Share of cohabiting unions among all unions of women 25–29 by country, education, and decade – Ecuador, El Salvador and Guatemala



Source: Prepared by the authors based on census and national survey data.

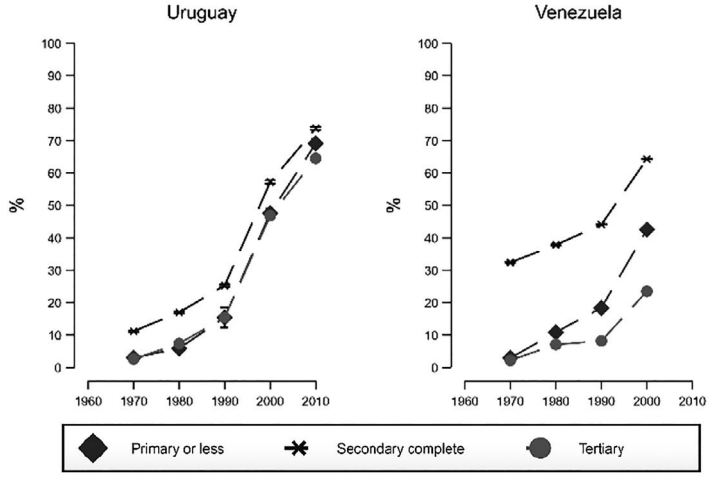
Figure 28.1d Share of cohabiting unions among all unions of women 25–29 by country, education, and decade – Honduras, Mexico and Nicaragua

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Source: Prepared by the authors based on census and national survey data.

Figure 28.1e Share of cohabiting unions among all unions of women 25–29 by country, education, and decade – Panama, Paraguay and Peru



Source: Prepared by the authors based on census and national survey data.

Figure 28.1f Share of cohabiting unions among all unions of women 25–29 by country, education, and decade – Uruguay and Venezuela

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28.3 CONCLUSION

Nonmarital cohabitation and marriage have historically coexisted in Latin America. The 'Dual Nuptiality System' recognizes marriage and cohabitation as socially accepted forms of conjugal and family arrangements. Nonetheless, the union type has been highly determined by individuals' sociodemographic characteristics, such as race, socioeconomic status, and geographical location. Specifically, cohabiting unions have traditionally been more common in Central America and among low-educated, mixed-race individuals. Yet since the 1970s, cohabiting unions have increased considerably, especially in countries that historically presented low levels of unmarried cohabitation, primarily among highly educated individuals.

The magnitude of the rise in cohabiting unions has meant that marriage has increasingly lost its prominence in people's lives (Esteve et al., 2022). Research shows that the probability of being in a marital union has steadily decreased, especially among young people, that marriage has ceased to be the preferred type of first union, and fewer people in cohabiting unions eventually transition to marriage. Childbearing is now less commonly associated with marriage. Studies indicate that nonmarital cohabitation is an essential phase for romantic couples. What's more, for many of them, it will be the only form of conjugal union they experience during their lifetime.

While cohabitation has become a common aspect of individuals' life course across all socioeconomic strata in Latin America, that does not mean that the historical 'Dual Nuptiality System' has become obsolete. The adoption of cohabitation as a couple arrangement among highly educated individuals indicates diverse motivations. For this group, cohabitation serves as a potential alternative or a precursor to marriage. In contrast, individuals with lower socioeconomic status often see cohabitation as the most feasible arrangement in a context of ongoing economic uncertainty and financial constraints (Covre-Sussai et al., 2015).

In a context where cohabitation is progressively becoming an integral aspect of individuals' life courses—not only as a couple arrangement but also as a distinct family structure for bearing and raising children—research should prioritize the examination of stability and dissolution processes within cohabiting families. Furthermore, the greater instability of cohabitation compared to marriage suggests that not only do men and women face a higher risk of separation, but also children born within these unions risk suffering the effects of that instability. Future research should study the increasing levels of family instability from children's perspectives and explore the implications for their social, economic and emotional well-being.

The historically high levels of cohabitation have meant that legal and normative frameworks have emerged early in the region. Since 2015, all Latin American countries have recognized cohabiting unions. To be recognized, most cohabiting unions must fulfill certain conditions of stability and exclusivity. For example, couples need to prove that they have been in a coresidential union for a certain amount of time (usually between two and five years), and in some countries, having a child in common is enough. The recognition of the cohabiting union as such entails the regulation of property regimes and maintenance and inheritance rights. In all countries except Argentina, Chile, El Salvador, and Honduras, cohabiting couples can access the same property regimes as marriages. The specific process to register a legally recognized cohabiting union varies across countries; however, recent legislation has attempted to facilitate the process as much as possible. A key issue is 'that in practice, for women's property rights to be honored, these must be registered' (Deere and León, 2022, p. 609). Research in Colombia and Ecuador shows that less than 10 percent of cohabiting unions are registered. Moreover,

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evidence shows that women have much less knowledge of their property rights than their male partners. Consequently, despite the efforts made to provide equal rights to cohabiting and marital unions, in daily reality, women in cohabiting unions are in a considerably more fragile economic and social position than those who are married. This is added to the fact that women usually assume most of the burden of childcare in the event of a breakup and are more likely to have lower earnings or be economically inactive (than the male partner) (Aragao and Villanueva, 2021; Arriagada, 2014). In this context, the awareness and enforcement of women's property, maintenance, and inheritance rights have become increasingly important for them and their children's socioeconomic well-being.

NOTES

1. For all countries, the census data that was used was provided by IPUMS-international (Minnesota Population Center, 2023), except for the 2010s, where household or Demographic and Health Survey data was used for the following countries: Argentina, Chile, Colombia, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay, Peru. For further information about the data and the analytical sample used, see Wiegand-Cruz (2025).
2. Most Latin American countries gained independence from the Spanish Crown within the first three decades of the nineteenth century. Similarly, Brazil became independent of the Portuguese Crown in 1822.

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Index

active inference 232
adaptation
  allostatic 234
  in migrant groups 216, 220–221, 222
  and stress 228–9, 234, 235, 236
  transitions requiring 56
  see also Vulnerability-Stress-Adaptation Model
adverse childhood experiences (ACEs) 234
affective rigidity 234
affordances 231, 232
alliance theory 26
allostasis
  dependency on social behaviour 231
  distribution of labor and interdependence 232–3
  implications for partnerships 235
  incentives driving allostatic behaviour 229–31
  as process by which we adapt 228
  social 233–4
  and stress 228–9
allostatic load 229, 232, 233–4, 235
anthropological perspectives
  contemporary themes, theorizing, and findings
    forming and living intimate relationships 28–9
    framing intimate relationships 29–30
    opting out of marriage 30–31
    ritualizing and celebrating intimate relationships 29
  introduction to 24–5
  from rituals and regulations to practices and experiences 26–7
  study conclusion 31
anxious-ambivalent attachment style 52, 132
arranged marriage
  defining 76–7
  in East Asia 78–9, 84
  future research directions 85
  historical and geographical context 78–9
  in MENA region 316, 320, 322, 324, 325
  vs modern marriage 322
  in South Asia 79–80
    ambiguities in 81–4
    quality and duration of 84
    spouse selection criteria 81–4
    variation of marriage practices 80–81
assimilation theory 214, 217–18, 220, 222
assortative mating 68, 142, 146, 147, 247, 335, 342–3
attachment theory 51–3, 132
attractiveness
  online hierarchies of 142–3
  of relationships 3, 54
  and repartnering 155, 156, 157, 158
autonomy 52–3, 135, 245
avoidant attachment style 52, 132

bargaining theory 42
Bayesian brain hypothesis 231, 232
bigamy 19–20
biopsychosocial perspectives *see* neurobiology
bridewealth 25, 304–5, 307, 309–10, 311

childbearing
  changes in union status during pregnancy or after non-marital birth 258–9
  historical perspective 1, 16
  multi-partner fertility 7, 259
  non-marital
    explanations for increase in 256–7
    future research avenues 260
    in Latin America 354, 355, 356
    link to education 258, 356
    as not necessarily linked to cohabitation 16, 257
    trends 254–6
  previous research on partnership context of first births 257–8
  study conclusion and discussion 259–61
  see also cohabitation: childbearing within; marriage: and childbearing
chosen family 117
close relationships
  coexistence of happiness and strain 169
  father/child 154
  implications for partnerships and their transitions 235–6
  incentives driving allostatic behaviour 229–31
  as profoundly impacting human brain and body 228
  prospective cognition and Bayesian brain hypothesis 231

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social allostasis and social allostatic load 233–4
social baseline theory 232–3
stress and adaptation 228–9
co-transitioning 90–93
cohabitation
as alternative family form reflecting relationship uncertainties 44
ambiguity surrounding 4
among ethnic minority youth 217
among migrant groups 216–17, 218
childbearing within
changes in union status 258–9
and destandardization of life course 45
explanations for increase in 256–7
in Latin America 347, 352–3, 355, 356, 357
as not necessarily linked to non-marital childbearing 16, 257
possible leading to marriage 70–71
previous research on partnership context of first births 257–8
relation to education 39–40, 257–8, 259–60
study conclusions and discussion 259–61
trends in 254–5
cohort trends in 66–7
in East Asia 4, 333–4, 338, 339–41, 343
economics of 293, 294, 296, 298
global trends 4
and health 203, 204–5
gendered differences 206
impact of pandemic 207
same-sex partnerships 206–7, 208
historical perspective 1, 15–16, 17, 21
institution and meaning of 41–2
international influence on 306–8
and LAT 103–4, 105, 109, 110, 112, 169, 173, 297
in Latin America 4
changing patterns in conjugal unions 353–60
conjugal union and childbearing 352–3
first union and union transitions 351–2
introduction to 347
and migration 216–17
prevalence of cohabiting unions 347–51
study conclusion 361–2
traditional and modern cohabiting unions 355–7
as less in need of explanation 46
and marriage 64, 65, 67–72, 298
men having greater control over progression of 42
in MENA region 326–7
and money management 245
as more compatible with conditions of uncertainty 40, 297, 298
parental preferences, and children 193, 194, 195, 198
and pension benefits 181
and repartnering 153
research areas of interest 70–71
SDT on 39–40, 67–8, 256, 293, 357
seen as testing ground 41–2, 71
and socioeconomic status 280
in South Africa 31
in sub-Saharan Africa 306
theories striving to explain 45
understanding diverse meanings of 69–70
understanding rise in 67–9
coming out 90, 123, 124
commitment
and cohabitation 4, 41, 245, 294
and decision to have children 260–261
defining partnerships through 2–3
definition 2
as dimension in triangular theory of love 2–3
entering marriage to signify 3, 41
fear of 44, 69
as indicator of relationship quality 3, 265
investment model of 53–4
in later life 169, 173
in polyamorous everyday life 119–20, 124
and positive dyadic coping 97
waxing and waning 5
communal relationships 54
comparison level (CL) 53
of alternatives 53
conjugal family 39
conjugal trajectory 104–5, 112
conjugal union
in Latin America 352–3
explanations for changing patterns in 353–7
understood as marriage 24
consanguineous marriage 3–4, 316, 322–3, 325
consensual non-monogamy (CNM) 117, 118, 121, 122–3
see also polyamory
contacting behaviour studies 141–3
couple formation 102, 103–4, 109, 112–13
couples
in Africa 28–9, 30
and allostatic adaptation 234
and cohabitation 4, 41–2
coping with stress 54–5
in definition of commitment 2
economic inequalities

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contextual drivers of 245–7
measures and status quo of 241–3
money management and access to resources 244–5
partnering and 283–5
study conclusion 248–9
theoretical approaches to relevance of 243–4
and family formation 260–261
in historical context 1, 14–21
later life 165–73
non-cohabiting *see* Living Apart Together (LAT)
online formed vs offline formed 146–7
relationship development over time 55–7
relationship quality 265–73
same-sex vs heterosexual, and health 206–7, 333
self-actualizing 39–40
vs singlehood 134
vs stable intimate relationship 110–113
swinging 118
true couples 106
COVID-19 pandemic
influence on partnerships and health 207–8
and online dating, future research avenue 146
and polyamorous relationships 121–2
study on sexuality during 123
uncertainty during 296–7
cross-cultural comparison 64–72
cultural norms
African countries diverse in terms of 310
and age at marriage 17–18
of being single 131
divorce once seen as deviation from 324
and family influence 45
and polyamory 124

death of partner
economic wellbeing and welfare state 180–181
and health 179–80
and mortality 179
demographic change
in Africa 306–7, 311
in cohabitation 66–7, 70
educational expansion and secularization as drivers of 221
and increased divorce rates 68
link to value change 256
in marriage 64–5
and union formation 215
descent theory 26
differential parental investment 51
disorganized attachment style 52
diversity
in Africa 305, 308, 310
aim towards 98
of cohabitation 67, 69–70
gender 5, 89–94
of later-life partnerships 166, 173, 185
in MENA region 317–25
of older adults' biographies 7, 172–3
of polyamorous relationships 117, 118, 125
sexual orientation 94–7
understanding
family influence 197–8
family structure 196–7
see also migration, ethnic diversity, and partnerships; partnership diversity
divorce
as adverse childhood experience 178, 194, 234
in Africa 306
and arranged marriages 84
avoiding costly 41
in East Asia 333, 337–9, 343
fear of 68–9
and health 205, 208
and gender 206
historical perspective 1, 19–21
as important field of anthropological inquiry 30
increase in rates 178
in Latin America 353, 354
as less in need of explanation 46
in MENA region 323–5, 326–7
repartnering rates following 166
research area of interest 71
SDT on 39
and social stratification 280–281
theories explaining rise in 39–40, 45
see also grey divorce
dopamine 230–231, 235
dyadic coping
concept of 55
and health outcomes 181
and relationship quality 270
in sexual orientation diverse partnerships 8, 96–7
dyadic stress theory 92–3, 96, 170

East Asia
attitudes towards union formation 333–4
economic, social, and legal changes in 332–3
future of partnership in 343
online dating 342–3
partnership diversity in
cohabitation 339–41
divorce and remarriage 337–9

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international and internal marriage migration 341–2
marriage 334–7
same-sex marriage and partnership 341
economic consequences
of death of partner 180–181
gendered, of separation 158
of grey divorce 182–3, 184
economic inequality
in Africa 305, 307, 308
contextual drivers of 245–7
measures and status quo of 241–3
money management and access to resources 244–5
partnering's relation to 283–5
study conclusion 248–9
theoretical approaches to relevance of 243–4
economic uncertainty
conceptualization of 291
and marriage 292, 293, 294–5, 297, 298
objective side of 291, 293–5, 297
prolonged education as coping strategy for 68
subjective side of 291, 295–7
economic wellbeing
and divorce 183
and intra-couple inequalities 243–4, 248, 249
measures of 242–3
and social stratification 283
and widowhood 180–181
economy
economic uncertainty 291, 293–7
historical and theoretical standpoints 291–3
prospects 297–8
education
and demographic change 221
intergenerational transmission of opportunities 198
and partnering in Europe and US 280, 281
relation to childbearing within cohabitation 39–40, 257–8, 259–60, 356
and relationship quality 272
socioeconomic gradient in Latin America 356–7
as strategy to cope with economic uncertainty 68
as strongly intertwined with partnership 6
educational attainment 42, 43, 157, 195, 248, 281, 285, 332, 356
educational homogamy 159, 281, 282, 284, 337, 343
emergent distress 55–6, 266
employment instability 293–4, 296
employment uncertainty 40, 296–7, 298
enduring dynamics model 266
ethnic diversity *see* migration, ethnic diversity, and partnerships
Europe
arranged marriage 76–9, 83, 85
childbearing in 4, 254–61
decline of marriage rates 4
divorce rates 135, 178
education and partnering 280, 281
effects of temporary work arrangements on marriage 294–5
historical perspectives on partnering 8, 14–21, 292, 353–4
LAT relationships 102, 166
LGBTQ+ 89, 124
marriage and cohabitation 64–72
marriage indicating higher level of commitment 45
parental socio-economic background and union formation timing 198
partnering among immigrants in 214–22
singlehood 129
evolutionary psychology 50–51, 132
exchange relationships 54
exchange theory 43
exogamy 217–18, 220, 221
external context in relationship quality 270–271

family change
in East Asia 332, 333
and increase in individualism 43
in MENA region
and diversity and continuity 317–25
theoretical considerations 316–17
predictions of direction of 39
family formation
and demographic convergence 310
and economic uncertainty 291, 293–4
explanations to understand changes in 259–60
growing inequality in processes 146
and ideational change 67
intentions of app users 144
in Latin America 354–6, 361
in MENA region 324, 326
pathways stratified by parental socioeconomic background 198
precarious economic circumstances motivating delay in 291–2
in sub-Saharan Africa 306, 308
traditional, as less prevalent 254
family influence
in comparative perspective 197–8
consanguine marriages linked to 219
continuing into children's adulthood 195
family structure 196–7

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opportunity structures 193, 195–6
preferences 193–4
resources 193, 194–5
schematic model of 192–3
study conclusion 198–9
understanding diversity 196–8
family kaleidoscope 1–2, 8–9
family structure
and inequality of opportunity 285–6
influence on relationships 196–7, 198
in Latin America 352–3, 361
family systems
and arranged and self-choice marriages 77
Asian, evolving toward more gender egalitarian model 342
of immigrant populations 215, 216, 221
macro-level theories 38–40
in MENA region 327
future narratives 46, 291, 295–8

gender
barriers and opportunities to leave partner 281
destandardization processes occurring by 44
and dyadic coping 96–7
historical survival rates 18
and money 242, 243–5, 246–8
and social stigma against cohabitation in Korea 340
gender differences
and arranged marriages 81
in health 171, 206
impact of repartnering on intergenerational ties 154
in life course patterns 184
in openness towards lower educated partners 142
in relationship quality 267
sexual selection differences explaining 51
gender diversity 5, 89–94
gender equality/inequality 40, 43, 68, 165, 220, 241, 247, 248, 256, 295
gender gap
after death of partner 180
repartnering 155–6, 158, 160
wages 42, 249
gender identity 89, 90, 92, 93, 97
gender norms
about femininity and masculinity 160
in Africa 307
and caregiving 173
differing across time, contexts, and couple types 246–7
in East Asia 334, 340
and economic wellbeing 283
in MENA region 317
patriarchal 269
social 7, 160, 244
traditional 280
gender relations
among married older adults 168
within partnerships 42–3
and relationship quality 269–70
sociological theories 42–3
gender revolution 40, 42, 214, 221, 249, 260
gender roles
among second-generation Turks in Europe 220
among sexual orientation diverse individuals 94
and individualism 44
in MENA region 319, 322
and older couples 167, 172
and partner relationships 40
and polyamorous relationships 124
and women's financial independence 244
and young adults' attitudes towards marriage 307
gendered divisions
of childcare 154
of labour
historical 29
and opportunity cost of partnerships 292
and resourceful men 280
while married 178–9, 182, 246
gendered patterns
of care 179
in diagnosis of mental disease 180
in effects of widowhood 180
and grey divorce 180
in migrant and ethnic minority groups 220, 221
gendered power 42–3
gradual disillusionment 55–6, 266
grey divorce
economic ramifications 182–3, 184
future research avenues 184–5
and health 181
introduction to 7, 178–9
resulting in reduced life satisfaction 183
study conclusions 183–5
welfare state 182–3, 184

health
and cohabitation 203, 204–5, 208
and divorce 181, 205
gendered differences in 171, 206
and influence of pandemic 207–8
and marital quality in later life 170–172, 173, 204, 206

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and marriage 203–4, 208
relationships impacting 228, 231, 232, 233–4, 235–6
and same-sex partnerships 206–7
and stress 228–9, 234, 235, 236
study conclusion 208
and widowhood 179–80, 205, 206
hedonic impact 230
historical and geographical context
arranged marriage 78–9
partnerships 7–9
historical perspectives
age at marriage 17–18
duration of marriage and likelihood of repartnering 18–19
formalising marriage 14–17
number of partners 19–21
partnerships and the economy 291–2
study conclusion 21
homogamy
age 335
differences by gender 282
earnings 284
educational 159, 168, 281, 282, 284, 337, 343
future research avenues 282
in online dating 147, 282
within relationships 281–2
social 6
socioeconomic 281
status 6
honeymoon-as-ceiling effect 266

incentive salience 230
income effect 292
India
arranged marriage 3, 77–85
relevance of care in 28
individual factors
in partner relationships 198
in relationship quality 266–8
individualism
as altering link between parental background and children's preferences 197
and destandardization of life course 44
increase in networked 134, 141
and LATs 4, 104–5
and marriage 41, 45
new family models based on 102
rise of 4, 43–4, 102
secular move toward 324
as underlying partnership change 45
individualization *see* individualism
inequality
in Africa 308–9, 310, 311
see also economic inequality; social inequality
insecure attachment style 52, 132
institutions
children abandoned to 16
defining partnerships through 3–4
of marriage
and cohabitation 41–2
and partnering 304
rejection of patriarchal 39
interdependence theory 2–3, 53–4
intergenerational transmission
of attitudes 196
of educational opportunities 198
of feelings of acceptance and warmth 198–9
marriage representing 218–19
of norms and behaviours 258
of partnership-related behaviour 192
of preferences 194, 216
processes of 197–9
intergroup marriages *see* exogamy
internal working models 52
international marriage migration 341–2
interpersonal relationships 4, 43
see also close relationships
intersexual choice 51
intimacy
anthropological studies of 27, 28–9, 30
and avoidant attachment style 132
as dimension in triangular theory of love 2–3
interpersonal process model of 54
low vs high avoidance of 52
online 146
sexual 9, 92, 97, 269–70
intimate relationships
among sexual orientation diverse individuals 94–7
among transgender and gender diverse individuals 89–93
forming and living 28–9
framing 29–30
LAT
future research avenues 113–14
stable 102, 103, 106, 109, 110–114
survey question 108
survey results 110–113
parental influence on children 197
polyamory 118
ritualizing and celebrating 29
intra-household allocation 244–5
intrapersonal impact on partner 91
intrasexual competition 51
investment model of commitment 53–4

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kinship
asking ritual 25
"bodies of kin" 26
and bridewealth 25
new studies of 26–7
and patrilocal residence 29–30
queer 28, 117–18, 124
reconfigurations of, in South Africa 29
shift to individualism 316
of young men and women 322, 323

labor market circumstances 291, 293–5
LAT *see* Living Apart Together (LAT)
later life partnerships
demographics of 165–6
marital quality 167–8
quality of different types of 168–9
transitions and partnership quality 170–173
later life transitions 167–8, 170–173
LGBTQ+ individuals 46, 89, 131
LGBTQ+ partnerships 5, 8
intimate relationships
among sexual orientation diverse individuals 94–7
among transgender and gender diverse individuals 89–93
protective factors and relationship maintenance 93–4
study conclusion 97–8
life course
destandardization of 44, 45
interrelations in 217
partnerships across 5–8
repartnering across 153–60
research 5
life course approach 109
Living Apart Together (LAT)
couple vs stable intimate relationship 110–113
definition
application of restrictive criteria in quantitative studies 108–9
categorization for research 106–7
formulating questions for quantitative surveys 108
multiple 107–8
no clear and precise 102
search for 106–9
support for life course approach 109
diversified prevalence in French surveys 110–113
gaining increasing attention from researchers 102
increase in 4
in later life 166, 169, 173
measurement 103, 108–13
as multi-faceted reality
differing from cohabiting unions 103–4
individualism vs conjugal trajectory 104–5
varying profiles of non-cohabiting relationships 105–6
and repartnering 153, 158
study conclusion and future research avenue 113–14
living arrangements
defining partnerships through 3–4
keeping secret, in polyamorous relationships 124
rising variety in 129
load sharing 228, 232
love
anthropological studies on 27
and caring for ailing partners 170
companiate 2
entering marriage to signify 3, 41
feminist and queer studies 28
and marriage in South Asia 30, 82–4, 322
passionate 2
rise of individualization impacting 43–4
romantic 230–231, 235
sociological studies on 27
triangular theory of 2
as way of defining partnerships 2
"love jihad" 30, 82

male-breadwinner hypothesis 39, 41, 181, 292–3, 295
marital quality
in arranged marriage 84
in later life 167–8
future research avenue 173
and health 170–171, 173, 204, 206
in retirement 172
lower-income couples 271
marriage
in Africa
customs 304–5, 309–10, 311
future research avenues 310–311
inequalities 308–9
trends 307–8, 310
anthropological studies
conceptualization of 24–5
defining 24
forming and living 28–9
framing 29–30
opting out of 30–31
from rituals and regulations to practices and experiences 26–7
study conclusion 31

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association with favourable economic conditions 291
and childbearing
in Africa 308, 309
changes in 254, 257
in China 334
in East Asia 333, 334
explanations for decrease in 256–7
future possibilities 45
later in life 308, 309, 333
in Latin America 352–3, 361
less common association between 361
prediction of uncoupling 39
reasons for cohabitors' change of status 70–71
women delaying 40
and cohabitation 64, 65, 67–72, 298
cohort trends in 64–5
deinstitutionalization of 41, 68–9
in East Asia 334–7
future for 343
migration 341–2
regime 332–3
same-sex 341, 343
and economic uncertainty 292, 293, 294–5, 297, 298
engagement as marker of intention 260–261
and health 203–4, 208
historical perspective
age at 17–18
duration of 18–19
formalizing 14–17
number of partners 19–21
institution and meaning of 41–2
intergroup *see* exogamy
in MENA region
age at 317–21, 325, 326, 327
arranged vs modern 322
consanguineous 3–4, 316, 322–3, 325
future of 325–7
in migrant groups 216–21
online dating for 143–4, 147–8
variation of practices in South Asia 80–81
see also arranged marriage
Middle East and North Africa (MENA)
family in
diversity, continuity, and change 317–25
future of 325–7
theoretical considerations 316–17
migration, ethnic diversity, and partnerships
international marriage migration 341–2
introduction to 214–15
partner choice 217–18
social integration 220
types and correlates 218–20
study conclusions 220–221
union formation
interrelations in life course 217
timing of 215–16
type of partnership 216–17
minority stress theory 92–3, 94, 95, 96–7, 206–7
money management 244–5, 249
mortality
among same-sex couples 207
and divorce 181, 205
gender differences 206
impact of relationship quality 228, 271
infant 18
and longer marriages 204
and widowhood 179, 180, 205

need 158
neoliberalism
and anthropological studies 28–9, 31
of intimacy, love, and marriage 31
neurobiology
context 228
implications for partnerships and their transitions 235–6
incentives driving allostatic behaviour 229–31
prospective cognition and Bayesian brain hypothesis 231
social allostasis and social allostatic load 233–4
social baseline theory 232–3
stress and adaptation 228–9
New Household Economic theory 241, 243–4
norms
about partnering 286
age at marriage 14, 17–18
of autonomy and jointness 245
changing 255, 257
family formation 197–8
and polyamorous relationships 124
societal 7–8, 9, 44, 130, 135, 208
traditional 45, 142, 221
see also cultural norms; gender norms; social norms

older ages
individualism 4
marriage at 65
repartnering 104, 157–8, 166
widowhood and life satisfaction 179
see also grey divorce; later life partnerships
online dating
in East Asia 342–3
future research avenues 145–6
and homogamy 282

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introduction to 141
long-term partnering outcomes and final matches 143–5
studies of preferences and contacting behaviour 141–3, 147, 148
study conclusions 147–8
wellbeing and mental health of dating website and app users 144–5

parental influences *see* family influence
parental resources 192–3, 194–5, 196–7, 198
parenthood
and imbalance in division of domestic labour 248
as important field of anthropological inquiry 29
marriage less dominant as preferred setting for 65
non-marital, historical perspective 16
parenthood gap 160
and polyamorous relationships 120, 121
repartnering 155–6
single 106, 254, 285–6, 333
transition to 56–7, 247, 258, 260, 307
partner choice
as altered by technology 148
concept 217–18
homogamy within relationships 281–2
social integration 220, 221
three main aspects driving 142
types and correlates 218–20
partner relationships
adaptive functions served by formation of 50–51
attachment patterns in 52
as at core of human society 50
future research avenues 58
and gender revolution theories 40
and interdependence theory 53–4
parental influences on
in comparative perspective 197–8
family structure 196–7, 198
opportunity structures 193, 195–6
preferences 193–4
resources 193, 194–5
schematic model of 192–3
study conclusion 198–9
understanding diversity 196–8
partner selection
cross-border 217, 218–19, 220
digital 6, 141–7
and educational homogamy 284
as important for inequality 285
in later life 167
and relationship quality 267
and socioeconomic homogamy 281
partnering
in Africa
evolving trends in 306–8
future research avenues 310–311
and inequality 308–9, 310, 311
international influences on 306
marriage customs 304–5, 309–10, 311
study conclusion 309–11
anthropological perspectives on 24–31
contribution to social inequalities 282, 286–7
economic inequality 283–5
economic wellbeing 283
inequality of opportunity 285–6
in East Asia
attitudes towards union formation 333–4
diversity in 334–42, 343
economic, social, and legal changes in 332–3
future of 343
online dating 342–3
historical perspectives on 14–21
in Latin America
explanations for changing patterns in conjugal unions 353–60
recent trends and patterns 347–53
study conclusion 361–2
in MENA region
family change in 317–25
future of family and partnership in 325–7
theoretical considerations 316–17
psychological perspectives 50–58
social stratification shaping
homogamy within relationships 281–2
trajectories 279–81, 286–7
partnership diversity
in contemporary East Asia 334–42, 343
as increasing 5
protection of, and terminology 10
viewing with kaleidoscopic lens 1
partnership formation
changes in Latin America 347–53
reasons for 353–62
and economy 291–8
as embedded within theories of world family systems 38–9
as intrinsically intertwined with other life events 44
online 6, 141–8
postponement of 5, 260
partnerships
across the life course
historical and geographical context 7–9
relational development 7

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spillover and crossover mechanisms 6–7
trajectories and timing 5–6
childbearing
changes in union status 258–9
multi-partner fertility 7, 259
non-marital, explanations for increase in 256–7
non-marital, trends 254–6
previous research on first births 257–8
study conclusion and discussion 259–61
concept 1–2
defining
flexibility in 4–5
through institutions and living arrangements 3–4
through love and commitment 2–3
in East Asia
diversity in 334–42
future of 343
and the economy
economic uncertainty 293–7
historical and theoretical standpoints 291–3
prospects 297–8
evolving trends in Africa 306–8
future in MENA region 325–7
and health
and cohabitation 204–5
divorce and widowhood 205
gendered differences 206
influence of pandemic on 207–8
and marriage 203–4
and same-sex partnerships 206–7
study conclusion 208
LGBTQ+ 5, 8, 89–98
neurobiological implications for 235–6
sociological theories on
gender relations 42–3
institution and meaning of marriage and cohabitation 41–2
macro-level family systems 38–40
rise of individualism and destandardization of life course 43–4
study conclusion 44–6
see also later life partnerships; migration, ethnic diversity, and partnerships
passion 2, 3
paternal certainty 51
polyamory
becoming 122
brief history 117–18
definitions 118–19
everyday life 119–22
legal recognition 119
as more common in higher socioeconomic strata in high-income countries 280
outlook for 124–5
people who "do" 122–4
polygamy 117, 353
polygyny 24–5, 51, 304, 305, 310, 311
preferences
family influence 192, 193–4, 195–6, 198, 199
intergenerational transmission 194, 216
online dating studies 141–3, 147, 148
prospective cognition 231
psychological theories 50–55, 58

queer kinship 28, 117–18, 124

relatedness 26–7, 28, 30, 31, 52–3
relational impact 92
relationship development 7, 55–7, 265
relationship processes
external contexts affecting 270–271
prenatal positive 57
and relationship quality 268–70
relationship quality
cohabitors reporting lower levels of 204
commitment dimensions determining 3, 265
conceptualization and measurement 265–6
external context 270–271
future research directions 272–3
impact on mortality 228, 271
individual factors 266–8
in later life partnerships 168–9
and meeting online 144
outcomes 271–2
relational processes 268–70
romantic, longitudinal course of 266
and stress 7, 55–6, 93, 228, 233–4, 236, 266–7, 270–272
ways to maintain and enhance 272
relationship science
as interdisciplinary field 50
psychological theories in 50–55
recommendations for 57–8, 273
and relationship development 55–7
remarriage
in East Asia 333, 338–9, 341, 343
historical perspective 19, 20–21
and later life relationship quality 169
repartnering
as coping strategy of divorcees 182
impact of children 199
likelihood of, in historical context 19
and mortality rates of widowed individuals 179
nature of 153

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overview 6
people who repartner
gender and parenthood 155–6
need, attractiveness, and opportunities 158
older ages 104, 157–8, 166
socioeconomic characteristics 157
people with whom people repartner 159
reasons to study 154–5
research recommendations 159–60
resource-bargaining perspective 241, 243–4, 246
resources
economic
access to 244–5
gendered decisions 243–4, 246
misconceptions surrounding 241
parental influence on children's partner relationships 192–3, 194–5, 196–7, 198
retirement
and grey divorce 182, 184
marital quality in later life 167, 172, 173
and pension income 242
risk distribution 232
ritual 25, 26, 29, 71, 121
role modelling 193, 194, 196, 198
romantic relationships
in East Asia 341, 342
and LAT 107
longitudinal course of quality 266–8
and singlehood 129, 132, 134
and TGD individuals 89, 90–91

same-sex partnerships
growing acceptance of 6
and health 206–7, 208
and marriage in East Asia 341, 343
registration of, in Japan 333
science
and gender transitions 92, 93
on polyamory 118
see also neurobiology; relationship science
SDT *see* Second Demographic Transition (SDT)
Second Demographic Transition (SDT)
and cohabitation 39–40, 67–8, 256, 293, 357
on family behaviours 39–40
and immigrants 217
and LAT relationships 102, 104
on level of normative control over individual values and attitudes 197
on major demographic changes taking place since 1960s 256
as not a unidirectional uniform process 221
as well-known theoretical paradigm for investigation of new family arrangements 293
secure attachment style 52
selective mortality 180
separation
as adverse childhood experience 178, 234
and arranged marriages 84
child residence following 156
and cohabitation 66–7
economic consequences 182–3
factors affecting 54
historical perspective 20, 21
as important field of anthropological inquiry 30
and institution of marriage 68
in Latin America 353, 361
moving out as way to avoid 105
at older ages 104, 157–8, 184–5
resource 245
single parenthood often following 285
and social stratification 279–81
women's economic wellbeing 283
sexual orientation diverse individuals
intimate relationships among 94–7
dyadic coping 8, 96–7
sexual orientation visibility management 94–6, 97
intrapersonal impacts 91
sexual satisfaction 57, 133, 269
sexual selection 51, 141
sexuality
homosexuality 51, 105, 341
and marriage dissolution in South Asia 84
and polyamorous relationships 118
same-sex 51
and singlehood 130, 131, 134
studies on
attitudes towards 215
during pandemic 123
sociological, ethnographic, and 27
single births 258, 260, 261
single parenthood 106, 254, 285–6, 333
singlehood
becoming more of a lifestyle choice 5, 46
categories of 130
childbearing 254–6, 257, 259
and consequences of 8, 133–5
vs couples 134
cultural norms of 131
defining 129–31
in East Asia 129, 332, 334, 340, 343
involuntary 130, 132, 135
lifelong, as rare 166
as likely to rise in MENA region 325, 327

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outcomes at different life stages 130
reasons for 131–2
social stratification shaping 279–81
study conclusion 135
trends 129
voluntary 8, 130–131, 132, 133–4, 135
social allostasis 233–4
social allostatic load 234–5
social baseline theory (SBT) 232–3, 235
social connections 26–7, 31, 134, 148, 228, 233
social exchange theory 2–3, 43
social inequality
and digital partnership markets 144
in Latin America 356
partnering 282
and economic inequality 283–5
and economic wellbeing 283
and inequality of opportunity 285–6
social integration 204, 220–221, 342
social networks 270
social norms
African countries diverse in terms of 310
and deinstitutionalization of marriage 68
vs individualism 45
as pillar supporting institution of marriage 41
and single, life-long, monogamous partnership 4
and status homogamy 6
social policies 182, 185
see also welfare state
social stratification
future research agenda 286–7
normativity relating to 286
partner choices affecting 282–6
shaping partnering
homogamy within relationships 281–2
trajectories 279–81, 286–7
socialization processes *see* value socialization
socioeconomic gradient
educational, in Latin America 356–7
positive, in marriage, in US 280
socioeconomic status (SES)
correlation with divorce 40, 280
and educational attainment 195
and educational homogamy 282
in Latin America 356, 361
and male excess mortality 179
and marriage rates 65
men's
correlation with propensity to delay marriage 292
influence of concerns about 68
and non-marital childbearing 257–8, 259, 260
nuanced association with relationship quality 267
partnering trajectories differing by 279
and repartnering 157
and single parenthood 286
socioemotional selectivity theory (SST) 167, 171
sociological theories
gender relations 42–3
institution and meaning of marriage and cohabitation 41–2
limitations 44–6
macro-level family systems 38–40
rise of individualism and destandardization of life course 43–4
study conclusion 46
South Asia
arranged marriage 3, 79–85, 322
consanguineous unions 322
marriage migrants 342
and politicization of love and marriage 30
spillover and crossover mechanisms 6–7
spouse choice 79, 81, 82, 84, 85, 102, 353
spouse selection 76, 81–4, 85, 322
status-exchange theory 218, 220
stress
and adaptation 228–9, 234, 235, 236
of being alone 233
caregiver 170, 173
and decremental model of ageing 168–9
dyadic 92–3, 96, 170
external 270–271
implications for partnerships 235
and life events 56
minority 92–3, 94, 95, 96–7, 206–7
and relationship quality 7, 55–6, 93, 228, 233–4, 236, 266–7, 270–272
and social soothing 233
stress models 54–5
Sub-Saharan Africa
evolving trends in partnerships 306–8
future research avenues 310–311
inequality and partnering 308–9, 310, 311
international influences on partnering 306
marriage customs 304–5, 309–10, 311
study conclusion 309–11
substitution effect 292
"super diversity" 214

TGD *see* transgender and gender diverse (TGD) individuals
timing
of marriage 41, 45, 192, 194, 307, 308, 335
of migrant union formation 215–16
and partnership trajectory 5–6
trajectories

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of change 38, 45, 57
individual or conjugal 104–5, 112
of marital quality 167
partnering
future research directions 286–7
socioeconomic benefits and costs of following 283–6
socioeconomic stratification of 279–81, 286
partnership 5–6
relationship quality 266–8
repartnering 6, 153–4, 156, 158, 159–60, 281
satisfaction 56
unidirectional 38, 40, 45
transformation of motivation 54
transgender and gender diverse (TGD) individuals 89–90
co-transition 90–91, 97
dyadic stress theory 92–3
intrapersonal impact on partner 91
relational impact 92
coming out 90
transitions
affective rigidity and flexibility 234
co-transitioning 90–93
definition 56
family formation 260
fertility 154–5
later life 167–8, 170–173
partnership, neurobiological implications for 235–6
related to health 56–7
retirement, effects of divorce on 182
union 351–2

uncertainty hypothesis 293, 295
union formation
attitudes towards, in East Asia 332, 333–4
and digital partnerships 144
and economic conditions 8, 291, 294–5, 296–8
LAT as stage in 104
in Latin America 356
link with parental socioeconomic background 198
migrant group
future research directions 221
interrelations in life course 217
timing of 215–16
type of partnership 216–17
patterns in marriage and cohabitation 65–72
salience of exchange theory in 43

value socialization 193, 194, 196, 197, 198
virtual relationships 9, 145–6
see also online dating
visibility management 94–6, 97
Vulnerability-Stress-Adaptation Model 54–5, 56, 266

welfare state
grey divorce 182–3
and widowhood 180–181, 184
wellbeing
of children in Africa 305, 309
of dating website and app users 144–5
health, and divorce 206
how relationships impact 232, 235–6
in later life partnerships 166, 169, 171
and marriage 203
mental 93, 96, 97, 180, 205, 285
and relationship quality 169, 265, 269, 271–2, 273
and repartnering 6, 154, 160
same-sex couples 207
sense of autonomy promoting 52–3
and singlehood 133–5
of women in Africa 305, 307
see also economic wellbeing
Western, Educated, Industrialized, Rich, and Democratic (WEIRD) societies 57
widowhood
consequences of death of partner 179–81, 183
and health 179–80, 205, 206
historical perspective 19
introduction to 7, 178–9
and repartnering at older age 157–8, 166
and welfare state 180–181, 184
work inequalities 245–7, 248–9

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