# 1 Introduction

*“Choose your life's mate carefully. From this one decision will come 90 percent of all your happiness or misery.”*

― H. Jackson Brown Jr., The Complete Life's Little Instruction Book

This quotation of an American bestselling author illustrates the critical importance of mate selection. However, bookstores and newspaper kiosks are not the only places where one can find numerous musings on the best approach for the search for “the one.” Researchers of a variety of scientific disciplines have dealt with this topic for many years. Their aims are to decipher the factors which influence relationship success and to uncover the underlying mechanisms concerning mate selection.

The lion’s share of the studies that have been carried out suggests that homogamy theories are most suitable to explain these mechanisms. According to these theories, people tend to start a relationship with someone who is similar to them. The characteristics that sociologists identified as important include: education, religion, social status and ethnicity (Kalmijn 1998; Esping-Andersen 2009)(Blossfeld, 2009; Schwartz, 2013).

Psychologists, however, focus on the role of preferences and personality traits (Buss and Barnes 1986). Eysenck and Wakefield (1981), for example, studied engaged couples in terms of personality traits and marital satisfaction. Their results suggest that similar couples lead a more successful marriage.

The number of studies that attempt to combine aspects of both approaches is limited and often education is used as a proxy for preferences and attitudes instead of measuring these aspects separately.

If one takes a closer look at the methodological studies on partnership success and relationship quality, it is apparent that their results are highly contradictory (Hahlweg 1991). There is no agreement as to which factors most strongly influence a relationship or whether the identified factors have a positive or negative impact on the relationship. This is one of the reasons why, despite the impressive number of years of research, this subject has lost neither its actuality nor its scientific relevance. Furthermore, its significance lies in the fact that people spend a considerable part of their lives in close social bonds. Considering this, it is not surprising that few events in life have such negative consequences as a breakup or a divorce.

Thus, it is essential to prevent these incidents. In order to do so, one has to obtain knowledge of the factors that influence the quality of a relationship. Is the aforementioned principle of homogamy crucial only when it comes to selecting a partner? Or could it also affect relationship quality? Put briefly, are relationships based on the principle of homogamy of a higher quality than heterogamous ones?

These questions shall be addressed in the paper at hand. Though there are many dimensions of homogamy, I am especially interested in the effect of educational homogamy, or, more precisely, I want to examine if I as well find the positive influence of education on relationship stability and quality so often reported by several scholars (e.g. Tynes 1990; Garfinkel, Glei & McLanahan 2002; Goldstein & Harknett 2006) and if so, I would like to explore if this effect still holds after taking into account the important concepts of homogamous norms, values and preferences, which have yet to be investigated. As mentioned above, scholars usually use education as a proxy for these constructs. Although I am convinced that education plays a crucial role in the mate selection process, e.g. due to its importance as an indicator for status or the structuring effects of the educational system, I believe that the use of education as a proxy for norms and values is not a suitable approach. It is true that the extent of education a person achieved might influence the norms, values and preferences of said person, but educational attainment is only one of many factors that are involved. Socialization, which comprises a number of elements besides education, has a tremendous impact on the formation and internalization of these constructs. Therefore, I expect that the effect of homogamous norms and values differs from the effect of educational homogamy and that the effect of educational homogamy can still be found after homogamous norms and values have been taken into account.

By combining different types of homogamy studied by various scholarly fields – an enterprise long overdue – I hope to provide a starting point for a new way of analysis and to contribute to a more insightful, deeper understanding of the underlying mechanisms of the mate selection process.

# 2 Related research

## 2.1 A Sociological Perspective of Homogamy

Sociologists usually define the concept of homogamy as the similarity of partners in a relationship, for example, in terms of age, religion, race, or social origin. However, the partners’ level of education is by far the most studied characteristic and an essential criterion. On the one hand, this is due to the fact that education can be seen as a crucial variable for mate selection, since it reflects, at least to some degree, the cultural resources that affect individual preferences (Blossfeld and Timm 2003a). On the other hand, the degree of educational homogamy is an informative indicator for the rigidity of social boundaries, which describes the changes in the structure of households and families (Schwartz and Mare 2005). Additionally, due to its structuring effects, the educational system became an important marriage market over time (ibid.). The macro-sociological approach of examining (educational) homogamy prioritizes these effects. According to Blossfeld and Timm (2003a), the less able individuals and those from underprivileged families leave the educational system earlier than their counterparts who are better off. This selection process leads, in turn, to an increasing number of homogeneous groups within the educational system.

Plainly, they adopt one of Blau’s (1994) basic ideas – that structural homogenization has considerable consequences for the composition of social networks. In his view, the probability of forming meaningful friendships and relationships primarily depends on possibilities of contact. Thus, true to the phrase “who does not meet, does not mate,” a relationship with a similar partner becomes more likely due to the mere fact that similar individuals stay together in the educational system for a longer period of time. Simultaneously, the probability of building a bond with persons with other levels of education decreases significantly.

Other social researchers, too, see the basis for strong ties in socio-structural similarities (cf. Feld 1981; Fischer et al. 1977). Esping-Andersen (2009), however, is one of the few scholars who further clarifies this approach. He underlines the importance of shared values and preferences, which, according to him, are crucial for a successful relationship. He argues that partners with comparable social backgrounds and thus similar levels of education should have identical tastes, values and norms. Consequently, educationally homogamous couples should have identical preferences.

The idea of combining norms and relationships in a theoretical approach is not new. As early as 1978, McKenry et al. concluded that in order to understand human social behavior it is essential to take a close look at the individuals’ conceptions of values. They are convinced that the value systems of the two partners in a dyadic relationship interact continuously, thereby developing values regarding family and gender roles. The failure of this process leads to profound differences in values between the two parties, which contributes to the partnership’s instability.

Barelds and Barelds-Dijkstra (2007) emphasize the relevance of homogamy as well. They point out that it is usually extremely encouraging and reassuring to meet someone who is very similar to us. This is because these people validate our value system, our opinions and attitudes and our lifestyle. Furthermore, individuals, who are similar to us, seem more likeable. One attributes favorable values and attitudes to them, since everyone assumes that his or her own values and attitudes are the “right” ones.

## 2.2 Definitions of the quality of partnerships

## Social-psychological research not only analyzes the choice of partners, but is often interested in two other major constructs that are closely connected with relationships or marriages: the stability and quality of partnerships. The problem is that there is no uniform definition for any of the two constructs. Therefore, one can find a variety of methods of operationalization in the existing literature. According to Dinkel (2006), who deals with the different approaches on this subject in detail, one can distinguish three closely interwoven aspects of quality definitions. First, he mentions objectifiable, structural characteristics of a partnership, which he sums up with the term “relationship quality”. Second, he talks about the subjective evaluation of the relationship, which is equated with relationship satisfaction. The third characteristic is the continuance of the relationship, which he labels “relationship stability”.

The assumption that relationship quality is objectively measurable is widespread among social scientists. The most famous proponent of this view is probably Graham Spanier, who designed the Dyadic Adjustment Scale (DAS). The DAS is based on the assumption that relationship quality – also known as dyadic adjustment – can be described upon its position on a continuum that ranges from good to bad. This position depends on several factors: 1) disagreements, 2) interpersonal tensions and individual anxiety, 3) satisfaction with the couple’s relationship, 4) cohesion and 5) consensus on important issues affecting the relationship (Spanier 1976). Although Spanier’s musings were often criticized in the past, be it due to the dimensionality of the constructs, Spanier’s inconsistent argumentation (Dinkel 2006) or the way the components are combined (ibid.), the DAS is still one of the most commonly used instruments for examining partnership quality.

Another aspect, with which one can draw conclusions about the quality of a partnership, is relationship stability. Since the term is interpreted very differently in the literature, it also proves to be problematic in terms of a precise definition. The classifications range from couples who seriously consider separation to already separated or divorced couples (Dinkel 2006).

The last point worthy of discussion is the correlation between relationship quality and relationship stability. It seems plausible that successful relationships should also be stable, while it might be expected that unhappy relationships will be terminated. In contrast, Lewis and Spanier (1979) emphasize that the quality and stability of a partnership are independent of each other and thus should be considered separately. They note that there are both durable, yet unhappy relationships and successful, yet unstable relationships. They do not provide an explicit explanation of this phenomenon. However, normative and cultural circumstances could play a role. If the couples are embedded in a context that leads to an internalization of values ​​and explicit standards of conduct regarding the indissolubility of relationships, their partnerships will probably be dissolved less often (Hunkler and Kneip 2008).

To fully take all these factors suitably into account, it is necessary to divide the feature “relationship stability” into two parts. On the one hand, there is the subjective relationship stability, which results from both partners’ personal assessment of the durability of the partnership, and on the other hand, there is the objective relationship stability, which contains information about the formal status and the duration of the relationship (ibid.).

Relationship satisfaction, a purely subjective criterion of quality measurement that is often praised for its conceptual simplicity and clear interpretability (Dinkel 2006), will not be used in the proposal at hand. The reason for this is the well-known and widespread problem that often occurs in regard to satisfaction judgments: the general tendency of respondents to report a very high level of satisfaction.

## 2.3 Relationship quality and stability: Family economists’ approach

Becker et al.’s (1977) approach called “family economics” belongs to the group of rational choice approaches and states that individuals are primarily concerned with the satisfaction of their needs and hence act with the aim of maximizing individual benefit. According to the authors, this principle can also be applied to relationships. Thus, the dissolution of a partnership is the result of a comparison between the cost/benefit ratio regarding the current relationship and its best alternative. If the comparison leads to results in favor of the alternative, a rational individual will end the relationship.

According to Hunkler and Kneip (2008), who share this family economical perspective, small benefits in a relationship (in other words, a low relationship quality) are mainly due to a lack of investment in relationship-specific capital. However, a second evaluation of the costs and benefits based on new information can have a negative impact on the perceived outcome as well (ibid.). Furthermore, it must be noted that the assessment of the benefits of a relationship with the current partner has been affected by the information asymmetry on the marriage market (Becker et al 1977). That is, it is possible that the assessment undertaken prior to the beginning of the relationship is quite flawed and the expected benefit might differ a lot from the actual one.

## 2.4 Linking homogamy, quality and stability

For the purpose of this study, it seems beneficial to take a closer look at the links between homogamy and both relationship quality and stability and to summarize the presented arguments. The majority of previous research, which studies at least some aspects of this issue, finds that homogamy is advantageous and favorable. As early as 1976, Hill, Rubin, and Peplau discovered that similarities between dating couples can predict whether the couple will still be together two years later. Contemporary studies, too, suggest the existence of such a correlation. Garfinkel, Glei and McLanahan (2002), for example, claim that educational heterogamy is connected to instability of both marital and non-marital relationships and Goldstein and Harknett (2006) state that married couples with the same race or ethnicity were more likely to stay married after the birth of their first child than couples who crossed race/ethnic lines. Brines and Joyner (1999) focus on the part of household income that is provided by each partner. They find that “partners whose employment and earnings are increasingly similar face sharply reduced risks of breaking up” (p.333). Interestingly, this effect is asymmetric: Heterogamy causes much more disruption when the woman earns more than her partner. Considering that Bitter (1986) reports similar findings for the effect of educational homogamy (which only causes instability when the wife is the one with a higher degree of educational attainment), this indicates that traditional aspects might play an important role as well. This is all the more reason for including norms into the analyses and further justifies my approach.

Morry (2005) attributes the positive impact of homogamy to a higher relationship quality. She argues that similarities are important to satisfaction because they facilitate partnerships and reduce the risk of conflict. Some years earlier, Tynes (1990) suggested a similar connection between homogamy and relationship quality, and stated that “social status characteristics are prominent factors both in selecting a mate and in the ultimate satisfaction with marriage, with some research findings indicating that homogamous unions result in greater satisfaction” (p.153-54).

The effect of relationship quality on its stability seems to be clear as well. Like Amato (2007) remarks, previous research shows exceptionally high correlations in marital happiness and other factors of relationship quality in stable marriages.[[1]](#footnote-1) For example, according to Karney & Bradbury (1995), a couples’ perception of the quality of their relationship contributes to the stability of their partnership, with a high quality leading to a more stable relationship. Wiik et al. (2009) also assume an association between relationship quality and dissolution risks.

However, as mentioned in the previous sections, some scholars disagree with the notion that all stable relationships are happy and that all unhappy relationships are instable. To take these objections into account, I consider different aspects of stability: a subjective and an objective part. To the best of my knowledge, my study is the first to examine these two aspects of stability. Therefore, this part of my analyses is merely explorative and descriptive. I hope to shed some light on this topic and to uncover whether such a distinction can provide a more detailed insight.

## 2.5 Hypotheses

The theoretical approaches presented in this paper allow for the derivation of various assumptions. Looking at Barelds and Barelds-Dijkstra’s (2007) reflections on the relevance of homogamy, the first hypothesis can be deduced.

1. *Any form of homogamy (be it educational or the homogamy of norms) should have a positive impact on relationship quality,*

since the partners get the impression that the other one understands them. Additionally, as mentioned above, the authors claim that people tend to evaluate similar others more positively, which should increase the relationship’s appeal.

The rationale of the family economical perspective is the satisfaction of needs through maximizing benefits and minimizing costs. This aspect suggests that

1. *increasing relationship quality leads to more relationship stability (objective as well as subjective)*

because remaining in a high-quality relationship results in large benefits and the probability of finding a better alternative decreases considerably. In addition, the costs that arise from the search for an alternative partner would not be justified in a high-quality relationship; it is more economical to maintain the current relationship status. Following this logic, it can be assumed that

1. *homogamy has a positive impact on both forms of relationship stability*.

Taking a closer look at the different types of homogamy and Esping-Andersen’s (2009) theoretical approach concerning educational homogamy in particular, a fourth hypothesis can be derived, which states that

1. *as a result of its underlying structural conditions, educational homogamy leads to a homogamy of norms.*

This follows from the idea that, due to the strong structural effects of the educational system, people with the same level of education should also have a similar social background.

If these four hypotheses hold true, one would expect that

1. *the effect of educational homogamy on relationship quality and stability vanishes as soon as homogamy of norms is added to the model.*

I am especially interested in the last hypothesis, because I do not believe that the effect of educational homogamy can be reduced to a homogamy of norms. If the last hypothesis has to be rejected, I can conclude that there are other processes related to educational homogamy that affect relationship quality and stability and that the use of educational homogamy as a proxy for norms and values is not a suitable approach.

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1. Although he refers to studies on marriages, I do not see a compelling reason why the correlation between relationship quality and stability should be different for cohabiting, not married couples. [↑](#footnote-ref-1)