

RESEARCH HANDBOOK ON THE SOCIOLOGY OF THE FAMILY

RESEARCH HANDBOOKS IN SOCIOLOGY

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Preface

The goal of this handbook is to provide readers with an overview of contemporary European family sociology. A total of 41 researchers from more than 10 countries across Europe have contributed to this project. The book covers classical themes of family sociology, such as the division of housework, family forms and living arrangements, intergenerational relationships, partner choice, divorce, and fertility behaviour. It introduces the reader to contemporary theories and controversies. In addition, several emerging topics are addressed, including medically assisted reproduction, 'digital' family sociology, and transnational family research.

Despite our attempts to cover different themes, perspectives, and theories, such a handbook can never be complete. It is inevitable that some gaps remain, and that some topics, theories, and countries are covered in greater detail, whereas others are barely touched upon or even left out altogether. Nevertheless, we hope that the chapters assembled in this volume will give the reader a flavour of what constitutes 'European family sociology'. By European family sociology, we mean theoretical and applied sociological research that uses state-of-the-art methods and data to examine past and present developments in family behaviour, family dynamics, family structures, and intergenerational relationships in European countries. As such, the book reflects the diversity and commonalities that we see across European countries, and the attempts by sociology to describe, understand, and theorise the patterns found. With its wide range of legal and cultural contexts, studying Europe provides researchers with opportunities to explore the interplay of contextual factors and family behaviour. It also challenges existing theories and findings by raising the question of how valid and transferable they are across contexts. Scholars who have researched European family behaviour – whether in a single country or in a cross-national context – inevitably have to contextualise their findings. They must consider the question of whether their findings are unique, and whether they can be attributed to a specific cultural, legal, and socio-political context. Moreover, differentiations based on regional and socio-economic disparities have to be made. We hope that the chapters in this handbook reflect this spirit.

A handbook is never the work of the editors alone. First and foremost, a handbook is the product of the authors. We thank them for contributing excellent pieces of work, and for being very responsive to our suggestions and comments. Keeping deadlines was not always easy, particularly for those authors who were making their final revisions when the Covid-19 crisis hit Europe. We are grateful to the authors that despite these sometimes adverse circumstances, they contributed to this volume with high-quality chapters that reflect a high level of engagement. Each of the contributions underwent a review that was written by the editors with additional support from Anna Dechant and Ralina Panova (Federal Institute for Population Research, Germany). We thank Ralina and especially Anna for their excellent review activities. Without Anna's support during much of the work, the project would not have been completed on time. All chapters were language edited by Miriam Hils (Seattle, USA). Many thanks to Miriam for supporting this endeavour, and providing careful and professional editing of all of the chapters included in the volume. Harry Fabian was our main contact at Edgar Elgar, where he serves as a commissioning editor. Many thanks to Harry for supporting us in a number of ways, including by being very prompt in answering our countless questions about

format and style, and about the many other issues that came up during the editing process of this book. We also thank Wiebke Hamann (Federal Institute for Population Studies, Germany) for providing editing support. Finally, but no less importantly, our thanks go to Hans-Peter Blossfeld (University of Bamberg, Germany). Hans-Peter serves as the series editor of Edgar Elgar's Research Handbooks in Sociology series, and encouraged us to undertake this project.

Wiesbaden and Berlin, September 2020

PART I

INTRODUCTION

1. Introduction: The sociology of the family – towards a European perspective

Norbert F. Schneider and Michaela Kreyenfeld

1. ON THE WAY TO A EUROPEAN FAMILY SOCIOLOGY?

Most European countries have their own traditions that define the areas and topics of family sociology (for France, see Déchaux 2009; for Germany, see Fasang et al. 2016; Konietzka et al. 2020; for Italy, see Saraceni and Naldini 2013). However, it has been less clear what constitutes ‘European family sociology’, and whether such a classification would be reasonable in a time when research is becoming more collaborative, and is often geared towards publications in international, and particularly United States-based, top journals. Nonetheless, a number of trends have become apparent that suggest that there has been a significant change in the research landscape that may eventually lead to the development of a unique European family sociology.

Until the 1990s, sociological studies on the family were often limited to the national context. Moreover, they were predominantly written in the national language, particularly in the larger European countries, such as Germany, France, and Italy. Since then, research has moved beyond the narrow national context. It has ‘internationalised’, in the sense that both international comparative family research and international cooperation and exchange have become common. An increasing share of sociological research is being carried out by research groups made up of scholars from multiple countries. Large-scale comparative data projects – such as the Family and Fertility Surveys and its successor the Generations and Gender Survey, as well as the Survey of Health, Aging and Retirement in Europe – have all advanced comparative work on European family behaviour. As a result of such projects, we have become more aware of the peculiarities of family behaviour and patterns of single countries. This awareness has sharpened our perspectives, forced us to think beyond our respective national contexts, and raised the question of whether findings are transferable across countries. The European context has also been a source for theorising about family behaviour. The second demographic transition (SDT) theory and the comparative welfare state approach are two key and prominent examples of theories that have clearly evolved in response to the family developments in European countries (see Nauck as well as Neyer in this volume).

The aim of this research handbook is to provide a state-of-the art account of European family sociology. We discuss landmark theories, illustrate major trends, and introduce the reader to established and innovative methods for describing and analysing the complexities in family behaviour and family patterns in European countries. Our hope in doing so is that this research handbook will contribute to the further establishment of a European family sociology. In this chapter, we seek to answer the following questions: How has European family sociology developed in recent decades? What are the key topics in the field, and how have they been changing over time? What relevant topics may have been neglected? What are the theoretical innovations in the field? What are the methodological challenges? How much

does progress in the field depend on data availability? What are, more generally, the avenues for future research?

2. A SHORT ACCOUNT OF THE MAIN OBJECTIVES OF FAMILY SOCIOLOGY

2.1 Family Change in Europe

European families are undergoing a process of profound change. In addition to the changes that are occurring in family forms, family behaviour, and family dynamics, the relationship between the family and society is undergoing a process of transformation. At the core of this shift is the transition away from the family representing a social institution with roles and functions and towards the emergence of a community of individual responsibility and group solidarity that is considered worthy of support (Schneider 2012). For several decades, the main topics that have been addressed in applied family research include the diversity of living arrangements, the increase in non-marital births, late home-leaving, the postponement of first childbearing, childlessness, and divorce and separation. The analysis of internal structures and relationships between family members – within and, more recently, beyond the household context – has also always been a part of mainstream family sociology. The division of care and housework within the household context is probably the most prominent theme in this area of research (see Grunow; Evertsson et al. as well as Sullivan in this volume). Such processes have been triggered and shaped by a number of factors, including the still ongoing increase in the labour market participation of mothers and related shifts in the participation of fathers in family and care work (see Matysiak and Cukrowska-Torzewska in this volume). Beyond those topics, scholars have increasingly been investigating intergenerational relationships, including parent–child relationships, as well as relationships between grandparents and grandchildren (see Skopek as well as Zartler in this volume). Many of these studies have concluded that relationships in families – that is, between parents and children, as well as between partners – have become less hierarchical, and more egalitarian.

Many of the above-mentioned trends have been moving in similar directions in most European countries. There are, however, major differences in the onset and the pace of the development of these trends. This is probably most obvious in the case of non-marital childbearing, for which we have comparable data across countries and can identify clear regional patterns, with the Nordic countries being the vanguards and the rest of Europe lagging behind. Divorce rates have been following a similar pattern, with Ireland, Malta, and some Eastern and Southern European countries being the laggards in this development. More recently, however, reversals of these trends have been documented (see Sobotka and Berghammer as well as Berrington in this volume). There is, for example, evidence that non-marital birth ratios are stagnating or falling slightly in the Nordic countries and France, and that the divorce rates are declining in some European countries. It is too early to tell whether these developments are indeed initial indications of trend reversals, or are, rather, indicative of a ‘stable state’ characterised by high rates of separation and high ratios of non-marital births. Regardless of how they are interpreted, these developments clearly challenge existing theories and perceptions of a unidirectional trend in family behaviour.

There are also more recent developments that are increasingly attracting attention in family research. Major shifts in family structures and family behaviour after separation and divorce have been documented (Mortelmans and Zartler in this volume). Fathers remain more involved in their children's lives after separation and divorce than was the case in previous decades. Indeed, the shift towards joint residence becoming more common calls into question previously uncontested categories, such as single and non-residential parenthood. These changing residence patterns have also challenged prior research on family forms, which was often restricted to the household context (see Widmer in this volume). In the same vein, the importance of 'multi-locality' is growing. This also pertains to the analysis of the family behaviour of migrant and 'transnational' families (see Merla et al. in this volume).

Some scholars have observed an 'intensified' approach to parenting, with unclear consequences for children's educational outcomes and social inequality between children and families. At the same time, the growing awareness of child well-being has been accompanied by a strengthening of the legal position of children and child well-being in national and supranational legislation (such in Article 24(2) of the Charter of Fundamental Rights of the European Union). Another important development concerns relations within families, including changes in parenting styles and objectives. Intergenerational relations in contemporary Europe can be regarded as harmonious and low conflict, which is not a phenomenon that can be taken for granted given the longer historical context. Previously, family and ageing research were generally seen as separate spheres of investigation. However, changes in family behaviour at older ages are increasingly straddling these two areas of inquiry (see Dykstra in this volume). An example of research that touches on both spheres is the study of 'grey divorce'.

Family research is also clearly affected by mega-trends, such as the 'digitalisation' of our society. Digital trace and social media data are potential sources for innovative family research that have yet to be tapped (see Legewie and Fasang in this volume). Digital communication and smartphone usage also have profound implications for family life, family relations, and child well-being that have yet to be fully examined by family scholars. Medically assisted reproduction (MAR) is another 'technology-induced' topic, which, in recent years, seems to have developed into an established research field at the intersection of family sociology and medical research (see Passet-Wittig and Bujard in this volume). A significant societal development that we were unable to cover in this research handbook is the Covid-19 crisis, and how it is affecting family relationships and family behaviour. The large body of literature that has already been published on the pandemic up to today (August 2020) is indicative of how family researchers work. It shows that family researchers can quickly bundle their resources and focus their attention and research interests more decisively on current trends and socio-political challenges than they could in the past.

2.2 Changing Objectives of Family Sociology

The scope of family sociology has expanded considerably over the past 30 years. Until the 1980s, it was common practice in mainstream family sociology to focus on the married family. Single motherhood was researched, but regarded as an 'incomplete family' that lacked the male guardian. Married stepfamilies were also regarded with a certain degree of suspicion. Since then, four lines of development in the field can be identified: an increase in research activities on living arrangements beyond the nuclear family; a move away from purely household-oriented and towards network-oriented family studies; greater consideration

of the process-oriented dimension of family, including of partner choice (Van Bavel in this volume); and a significant increase in research on internal family structures, instead of on mere morphology.

Associated with these extensions of the subject area, which often occurred only gradually, is a shift in the 'idea' and definition of the family. For a long time, the prevailing view was that a family consists of a married couple who live together with their children in a single household unit. Groups of people in other living arrangements were not regarded as families, and thus were not the core subject of family research. The subject area of family sociology has expanded since then, as the family is increasingly defined as a community of responsibility and care that extends beyond the boundaries of household, marriage, kinship, and even parenthood. In addition, it has been argued that the family should be understood not only as a structural form, but as a dynamic process that is shaped by a series of transitions, and the resulting phases and breaks. The complexity and the diversity of family dynamics is the focus of research today, rather than the old-fashioned model of the rigid and structured family cycle (Glick 1955; see also Konietzka and Kreyenfeld in this volume). Nowadays, purely morphological studies about the size and the composition of families and kinship relations between family members are rare in family sociology. The structure-related studies that are now being published focus less on the external structural characteristics of families, and more on the internal structures within families: namely, the relationships between partners, between parents and children, and with grandparents.

In the course of the shift towards process-oriented family considerations, the perception that after a separation a family is transformed into a post-separation family, and sometimes into a stepfamily, has become widely prevalent. This is associated with the idea that the family transforms or continues following a divorce or separation, rather than terminates. If there are children in the family, the family does not end with the divorce or separation of the parents, but instead becomes more complex and 'branched'. Post-separation families have always been connected through continuing financial obligations, such as child alimony and ex-spousal support. However, the bonds, relationships, and obligations among the family members become stronger and more complex through the joint care and residence of the children. As a consequence of these joint residence and care arrangements, many new questions and challenges regarding the legal regulation of post-separation family lives have emerged (see Zartler in this volume). Several countries have made progress on these issues, and support joint parenting in their legal framework. Other countries are still laggards in this respect. Even if there are laws that regulate family arrangements after a separation, the ex-partners face considerable challenges in coordinating the care and education of their joint children, and these arrangements are often the subject of intense, ongoing conflicts. However, there has been little comparative empirical research on the structures and relationships of such post-separation families. Moreover, relatively few studies have examined how these post-separation legal arrangements, such as child alimony and legal or physical custody, shape the family behaviour and well-being of post-separation families in European countries.

Another important feature of the recent changes in family research is the change in the concept of family: i.e., from *being* to *doing* family. This shift in research subjects has also been accompanied by a change in research topics. Today, social positions within families and their functions are seldom studied, but analyses of the relationships between family members are becoming increasingly common. The idea that the family is a social institution or a social system, as was long assumed in research based on the functionalist perspective (Parsons 1955),

is being replaced by the idea that families are forms of relationships and ways of life that are constantly being individually formed and shaped (Cherlin 2006; West and Zimmerman 1987). The most concise description of this change in perspective is that the institutional ‘being family’ is turning into the action-oriented ‘doing family’, or that role theory is being replaced with actor orientation. Especially in German-speaking family sociology, the concept of ‘doing family’ is prominent (Jurczyk et al. 2014). Given this increasingly pronounced action orientation in family sociology, it is not surprising that family research based on role theory, which dominated until the 1980s (Dahrendorf 1965), has now almost completely disappeared. In contrast, studies that assume that families act in rational and benefit-oriented ways have become increasingly common, and often rely on standard household economics (for a critical view, see Sigle in this volume). There are numerous studies in family sociology (and family economics) that analyse the division of household labour using bargaining models (Bittman et al. 2003; Lundberg and Pollak 1984; see also Grunow in this volume).

Since the 1980s, the main empirically verifiable structural change in the family has been interpreted as a transition away from the nuclear family, which had been seen as the ‘normal family’; and towards a diversity of family forms. There are two main competing interpretations of this change: the *crisis theorem* and the *resilience theorem*. Advocates of the crisis theorem interpret the change as the disappearance of the ‘normal family’, and highlight the negative repercussions family change has had for child development and social cohesion (McLanahan 2004; Whitehead 1993). Conversely, proponents of the resilience theorem argue that the diversity of family forms and the de-institutionalisation of the family are necessary preconditions for the emergence and stabilisation of open, pluralistic, and democratic societies (Stacey 1996). Inherent in this perspective is the assumption that family diversity is not a new development, but is, as socio-historical family research has shown, a ‘return to the normality of family diversity’ that has long been a feature of European societies, except perhaps in the heyday of the bourgeois family model, which is generally understood to have occurred between 1950 and 1975 for European countries (see Ehmer in this volume). Even today, the traditional nuclear family – defined as a co-residential heterosexual married couple with biological children who practise a strict division of labour between the male and the female partner – continues to be the reference point in much of our research (see Sullivan as well as Grunow in this volume). This may be explicable for welfare state research, given the path-dependency of political institutions. It is more interesting to observe that other types of research remain centred on a definition of ‘normality’ that only rarely fits the lived realities of families in contemporary Europe.

2.3 Methodological Developments

The expansion of the scope of the subject matter and the changes in the main ideas and definitions of what family means are not the only relevant changes in recent years. Perhaps even more significant for the further development of family research are developments in methods, data, and publication patterns and strategies. In the recent past, the variety of research topics in family sociology has increased tremendously. However, the trend towards a very small-scale differentiation of research questions can be even more clearly observed. One reason for this development is, no doubt, the complete shift in publication behaviour, which is increasingly oriented towards the writing of short empirical papers. Longer articles or even books seem to have fallen out of fashion. The pressure young scientists face to publish quickly, and

preferably in high-ranking international journals, is enormous, and supports the trend towards publications that address increasingly narrow research questions. This pressure is driving another trend as well. The vast majority of publications are based on large-scale datasets. In quantitative family research, small-scale and topical data collection is considered less important. Due to the content-related limitations, the possible spectrum of research questions is narrowed, since only the topics for which data are available can be researched. However, there are also many benefits related to this development: the availability of large-scale data has clearly advanced the quality of applied family research, and opened up new avenues for undertaking large-scale comparative research projects.

The trend towards improvements in the availability and the quality of data has advanced in tandem with the development of new methods for data analysis. While simple descriptive overviews can be highly influential and have considerable value, they are becoming rare (see, however, Liu and Esteve as well as Skopek in this volume). Large-scale panel studies and wide-ranging, internationally comparative studies currently determine the data landscape. Moreover, in some countries, register data, as well as linked register and survey data, are available. It is, in particular, the availability of large-scale longitudinal data that has led event-history modelling, sequence analyses, and fixed-effects modelling to become part of the standard canon of applied family research. Highly sophisticated methodological procedures and increasingly refined statistical techniques are employed – although it is sometimes doubtful whether the characteristics of the data used actually meet the model requirements. Whereas methodological developments have taken place at an amazing speed, relatively little is being invested in theory development. While quantitative data and studies currently dominate family research, the importance of qualitative and ethnographic research should not be underestimated (see Bernardi in this volume). Qualitative approaches may well receive more attention and consideration in the future, as they can fill in or point out the gaps that quantitative research cannot address.

While panel studies are now common, the importance of multi-actor designs in empirical family research is only gradually being recognised. The idea is slowly taking hold that a considerable proportion of family-relevant events – especially those based on decisions – cannot be attributed exclusively to the actions of a single individual, but should instead be attributed to decisions that are jointly made by couples or other groups of people within the family. It is likely that there will be an increase in the number of studies that explicitly generate such data, either by providing information about other individuals or by interviewing dyads. This development should further strengthen the life course perspective in family research, especially the ‘linked lives’ perspective (see Konietzka and Kreyenfeld in this volume).

2.4 Avenues for Future Research

While not all of the trends in family sociology of the recent past can be regarded as indisputably positive, a huge upswing in interest in family sociology is evident from the output that has been generated in the past decades, which has provided theoretical approaches to and descriptions of family behaviour in European countries. Family sociology has become an established field in European sociology that is ‘institutionalised’ in the committee ‘RC 6 Family Research’ of the International Sociological Association. Furthermore, family sociology has advanced because it has become increasingly interdisciplinary, and because it conducts research at the intersection of other research areas and disciplines, including stratification research, ageing,

family demography, and health. However, there are still many obvious gaps in sociological research that should be closed in the near future. Studies on the topics of emotions and sexuality continue to be severely lacking (see, however, Lenz and Adler in this volume). Similarly, while there has been significant research on family relations, kinship relations – such as sibling relationships and relationships with side relatives, such as uncles and aunts – are rarely the focus of studies. The relationships in post-separation families, as mentioned above, are also significantly under-researched. Despite the burgeoning literature on migration, there is surprisingly little research on the topic of ‘migration and the family’, or on the family behaviour and family arrangements of migrant families (see, however, Andersson in this volume). There is also a lack of quantitative data on migrants that can be used to perform fine-grained analyses of family behaviour by migrant subgroups, which are becoming increasingly important given the growing heterogeneity of migrant populations. Likewise, there has been little research on the topics of socialisation and family and generational relations in old age. In order to close these research gaps, more multi-disciplinary research will be needed, as, for example, Fasang et al. (2016) has called for. In the course of the aforementioned trend towards the partialisation of research topics, studies that address the relationship between family and society or the interactions between family and social systems (such as labour market, education, and child care) have moved into the background. However, such studies are indispensable for providing us with a better understanding of the causes and the consequences for society of changes in family behaviour and family patterns. We expect that family sociology will address the network perspective (see Viry and Herz in this volume) more in the coming years than in the past. In connection with mobility and migration, transnational families will increasingly come into focus (see Merla et al. in this volume). While dyadic data have been collected, there is certainly more scope for examining and understanding how life courses are linked, and how seemingly ‘joint decisions’ are made. In addition, the child’s perspective is gaining in importance, particularly with regard to studies on post-separation family life and family well-being.

We also expect to see further developments in data availability and data generation. Online supported surveys, which can be conducted cheaply and quickly, will gradually push classic survey methods, such as face-to-face surveys, into the background. The wider availability of register data and linked register and survey data may also fuel developments in the area of family research. While ‘big data’ have reconfigured research in many subject areas and disciplines, it seems that this process has been more gradual in family sociology. However, there is considerable potential for using digital trace and social media data in family sociology. The even more fine-grained capabilities of geo-referencing – i.e., the feeding of spatial information into a dataset – will allow for more refined, regionally differentiated analyses to be conducted. These technological advancements will clearly affect future research on the family as well. Artificial reproductive technologies (ART) and its consequences is already an established area of research (see Passet-Wittig and Bujard in this volume). The mega-theme of ‘digitalisation’ intrudes on family sociology through the many consequences smartphone and internet usage have for family life, family relationships, and child development. Digitalisation has also transformed the labour market, which has repercussions for family life. The Covid-19 crisis has sharpened our awareness of the opportunities and the pitfalls of home office and telework for combining work and family life. A number of scholars have already started researching these topics, often with the aim of producing social policy-relevant research findings.

More generally, European family sociology is increasingly attracting attention and interest outside the scientific community. To further strengthen the scope and scientific relevance

of family sociology, efforts should be made to expand its interfaces with related disciplines, particularly family demography, family psychology, epidemiology, health, and life course sociology. Building a stronger theoretical foundation for family sociology also appears to be desirable.

3. CONTENT OF THIS HANDBOOK

This handbook is organised into an introduction (Part I) and seven further parts. Parts II and III contain overview chapters that summarise classical as well as novel theoretical perspectives. The following parts address the topics we consider to be most important in contemporary family sociology: family diversity (Part IV), family transitions (Part V), intimate and intergenerational relationships (Part VI), and the division of work and household tasks (Part VII). Part VIII introduces readers to timely topics that raise important social policy concerns: namely, the regulation of assisted reproduction, child poverty, and the organisation of family life across national borders.

3.1 Theoretical Advances in Family Research

With its diverse social policies and cultural contexts, Europe is a unique laboratory for exploring the relationship between institutional factors and family behaviour. It comes as no surprise that the grand theories of family sociology, which focused on the interplay of context and behaviour, were inspired by the developments in European countries. The SDT theory is probably one of the most influential and most frequently cited approaches that aimed to describe and provide a theoretical foundation for the family changes that occurred in the second half of the last century in European countries, and that are, in part, continuing until the present day (Lesthaeghe 1995, 2010; Lesthaeghe and Surkyn 1988; Van de Kaa 1987). It has been rightly pointed out that the SDT theory is not a sociological concept, and may not even qualify as a theory in the first place (Coleman 2004). Nonetheless, the SDT approach borrows heavily from sociological theory, and it has drawn our attention to how cultural change – or, rather, ‘individualisation’ – transforms family behaviour. Another grand theory, which is also intangibly related to the developments on the European continent, is the comparative welfare state approach. Again, this approach may not be regarded as a core sociological concept. It is, rather, situated at the intersection of political science and sociology. Regardless of its disciplinary home, this theory has been one of the most influential works in the area of family sociology, as it filled an important void: i.e., it provided a framework for conceptualising how the social policy context mattered for family decisions and family well-being.

Gerda Neyer’s chapter introduces the reader to the welfare state approach. She reminds us that the modern welfare state has always been concerned with the well-being of families. From early in its history, important welfare state measures, such as survivors’ pensions, protected the family from the adverse consequences of the loss of the male breadwinner. Surprisingly, comparative welfare state research was fairly late in integrating the pivotal role of the family into the conceptual framework. Since then, however, the triad of market, state, and the family – as well as the distinction between ‘familialistic’ and ‘de-familialising’ policies – are the well-known pillars of this framework (Esping-Andersen 1999; Lewis 1992; Sainsbury 1996). While this welfare state framework was subject to severe criticism – in particular because of its

oversimplified categorisation scheme – the chapter by Neyer illustrates that these early works were foundational, as they defined a new paradigm. Instead of simply analysing single policies, the welfare state approach alerted us that we have to take a comprehensive perspective and examine the interplay of different policies if we want to understand family behaviour. The chapter also draws attention to new avenues for research in the area of welfare state research. The varieties of capitalism approach sheds more light on the roles of firms, trade unions, labour rights, and labour relations in the provision of welfare. Thus, the varieties of capitalism approach fills a gap that the classical welfare state approach left open. However, Gerda Neyer points out that more effort is needed to systematically integrate the role of the family into this framework. This is also the case for the social investment approach, which highlights that new social risks – most prominently, the Covid-19 crisis – reconfigure societies and welfare states. However, the social investment approach also needs to become more comprehensive by including the family in the production of welfare and in the amelioration of social risks.

The chapter by *Bernhard Nauck* adopts a cross-cultural perspective. It starts on a critical note, reminding us that prior research in this area was subject to certain ‘xenological tendencies’. While scholars that study behaviour in western societies mainly do so through the lens of rational decision making, investigations of non-western societies frequently take a ‘cultural turn’. Scholars often label their research as a ‘cultural study’ when the investigation involves a non-western society, regardless of whether several or only one country is being investigated. The chapter emphasises that any real ‘cross-cultural approach’ requires the comparison of at least two societies. Furthermore, a close examination of how the institutional fabric of a society is interwoven with the actual family behaviour is needed. The classical example of this type of research is the study of the historical differences in family patterns between Eastern and Western Europe. The patrilineal inheritance rules in western societies are closely linked to family behaviour and family structures – including the dominance of the neolocal family – that prevail in Western Europe (see also Ehmer in this volume). The chapter also challenges the grand theories of family sociology, including the above-mentioned SDT approach. Nauck raises concerns not only about the teleological perspective that characterises this approach, but about its simplified view of what constitutes culture. The ‘culture of individualism’ is taken as the gold standard in the SDT approach, without acknowledging that it may not be universal across societies, or mark the endpoint of societal development.

Eric D. Widmer’s chapter directs our attention to how we theorise ‘family’. The structuralist approach – which is most pervasive in the writing of Parsons – adopts a narrow definition of what constitutes the family: namely, the co-residential, married, heterosexual couple with their biological children. In many respects, we have overcome structuralism. However, much of present research on family diversity shares with this approach a commitment to the household perspective. The ‘configurational approach’ overcomes this shortcoming. From this viewpoint, the family is seen as a dynamic entity of individuals that changes across time, and that expands beyond the narrow thresholds of the household unit. The family is subject to a constant process of construction by its varying members. The ‘we-ness’ – and, thus, the belonging to a family – is a dynamic and ambivalent process. It entails positive as well as negative interactions, which is most obvious in the case of post-separation families (see also the chapter by Zartler). The configuration approach is strongly linked to classical network analysis, including the methods and techniques that study and visualise the ties and exchanges that exist between family members (see also the chapter by Viry and Herz).

Dirk Konietzka and *Michaela Kreyenfeld* summarise the evolution of the life course approach and its contribution to family sociology. The foundational work of the life course framework was laid by the pioneering studies of Glen Elder. This work emphasised the importance of ‘time’ for understanding social change and human behaviour. Life has a history: i.e., how we act today is related to our past experiences. Behaviour is also anchored in time, because individuals are located in a generational hierarchy. For family research, the introduction of the life course approach was fundamental, as it shifted the perspective from a more static to a more dynamic view of family behaviour. It is because of the contributions of the life course approach that scholars now pay particular attention to the timing and the transitions of family events, such as the timing of birth, marriage, or divorce. Life course research has clearly evolved in tandem with event-history analysis and, more recently, with sequence analysis. It has also motivated large-scale longitudinal data collection. Although the life course approach originates in the United States-based studies of Glen Elder, there is a ‘European’ interpretation of the framework that pays particular attention to the role of contextual factors, such as welfare state regulations, for shaping life course patterns.

3.2 New Perspectives in Family Research

As was alluded to above, advances in theory have been rather slow. In the absence of novel theories, we tend to revert to theoretical concepts that evolved decades ago. While these theoretical concepts may claim that they are universal and applicable to all societies and time periods, it is clear that they evolved against a specific societal backdrop, and responded to a particular societal problem or puzzle. This is very evident for the SDT approach, which was formulated in response to the changes in family patterns that have occurred since the late 1960s in Western Europe. While theoretical progress has been slow, contemporary family sociology benefits greatly from innovative data collection and sophisticated statistical modelling, and, more generally, from advances in information technology. The latter advances have allowed us not only to process ever larger datasets, but to visualise family behaviour with new and appealing techniques. It is possible that further progress in family sociology will be spurred by the challenges and peculiarities of our age. One of these trends is surely the digitalisation of science and society.

Nicolas M. Legewie and *Anette E. Fasang* introduce the reader to the emerging field of digital family sociology. Compared with other disciplines – and particularly compared with political science, in which the ‘scraping’ of social media data is now common practice – family sociologists have been rather slow to tap into this new area of research. The authors of this chapter bring our attention to the potential of these data. They explain that ‘big data’ is often used as a catchall term that covers very different types of data. Two types can be broadly distinguished: digital trace data that emerge as a by-product of internet use (such as Facebook data), and purposefully collected digital data (in particular, data collected through smartphone applications). These types of data could be used in innovative ways in family sociology and family demography. In family demography, digital trace data may become an important basis for predicting fertility trends. Compared with the data from more conventional sources, digital trace data are ‘real-time data’. Thus, the use of such data can help researchers overcome the shortcomings of classical survey data and administrative data (such as birth registers), including the long time lags between data collection and data analysis. Digital trace data also represent an untapped resource for time use analysis, including the analysis of the time use of

couples and of post-separation families. However, the authors of this chapter also alert us to the many unresolved ethical issues associated with the collection and use of these types of data.

Laura Bernardi introduces the reader to novel pathways for qualitative research in family sociology. Qualitative and ethnographic studies have always been key for understanding the meaning and motivations that people attach to family behaviour. Qualitative research operates as a magnifying glass; it teases apart the subjective and objective meaning that we attach to our actions. Moreover, qualitative research has long been seen as a useful way of collecting biographical information. However, a ‘panel perspective’ was absent from most prior qualitative studies. *Laura Bernardi* advocates bringing the panel perspective into qualitative research using a ‘qualitative longitudinal research’ approach. Under this approach, biographical interviews are collected repeated times over a significant period of the life course. This will enable the researcher to examine how individuals assign meaning to their actions, and how this meaning changes as time passes, and their circumstances alter.

Gil Viry and *Andreas Herz* provide an overview as well as practical examples from network analysis in family sociology. Since the pioneering work of *Granovetter* (1973), network analysis has been one of the standard tools of family sociology. While it is, therefore, an almost classical perspective, a lot of progress has been made in the field in recent years. Much of this progress can be attributed to advances in computer technology, which provided us with more sophisticated ways of visualising networks and their evolution across time. However, the revival of the network approach in family sociology must also be seen in conjunction with the changes in family behaviour in the recent decades. It is no longer adequate to view the family as a static group that is locked in a household unit (see also the chapter by *Widmer*). Family relations are dynamic, and extend across household entities. The network approach is able to capture and address the corresponding complexity of family diversity. The authors of this chapter suggest various possible avenues for future research in this area, in particular the shift away from an ego-centric perspective and towards a more socio-centric perspective in the analysis of family ties.

3.3 Family Diversity and Family Change

The study of ‘family diversity’ has a long tradition that is partially rooted in national household statistics that map household structures based on census or micro-census data. National statistical offices have been rather slow to include family forms, such as cohabitation and living-apart-together relationships in their official classification systems. Social science surveys have generally been able to overcome this shortcoming. They have also opened up opportunities to examine how family diversity unfolds across the life course. Moreover, sequence analysis has been an important tool for advancing research on the ‘de-standardisation’ of the family life course. Most studies take the nuclear family – defined as a married and heterosexual couple with their biological children – as a starting point for measuring diversity. Disagreement still exists about how to typify and label family forms beyond the allegedly ‘standard’ or ‘normal’ family form. ‘Unconventional’, ‘alternative’, or ‘non-traditional’ are all contested terms, as they are based on the premise that a certain norm dominates.

Josef Ehmer provides an account of historical perspectives on family change and family diversity. He reminds us that contemporary research tends to overemphasise the present, and often perceives the past as a monolithic entity. As a result, we tend to ignore the diverse family forms that existed in pre-industrial times. What we erroneously label as ‘modern family forms’

– such as stepfamilies and lone parenthood – existed throughout all historical periods. Scholars of family history also remind us that we sometimes adopt a simplified view of the prevalence of large and extended families during pre-industrial times. Extended families existed in some parts of Europe, but they were never as numerous as is often believed. Furthermore, the nuclear family is not an ‘invention’ of modern times, as it was a common family form in many parts of Europe before the Industrial Revolution. The most salient difference between families in pre- and post-industrial Europe is that in the former period, non-family members, such as lodgers or servants, were more likely to be part of the household unit. Ehmer also underlines in his chapter that the historical perspective casts a nuanced light on women’s role in society, suggesting that the degree to which family structures in historical Europe were patriarchal varied greatly. Thus, the position of women in the family, and, more generally, in society varied considerably across time and space, and was most evident in differences in inheritance rules and property rights.

Tomáš Sobotka and *Caroline Berghammer* provide a demographic account of the major changes in family behaviour and family diversity across European countries in more recent decades. The major changes that have occurred during the second half of the twentieth century in Europe have inspired the SDT theory. Many of the features that were described in this concept still adequately describe patterns of family behaviour in contemporary Europe, which include increasing ages at first childbearing, high divorce rates, and the spread of cohabitation. These trends and patterns have led to the emergence of a diversity of family forms beyond the nuclear family, and are already well documented. It is less well known that European societies seem to be moving closer together in terms of family behaviour and family structures. While there were previously large cross-country differences in the age at childbearing, today, the median age at which women have their first child is now around age 30 in most European countries. In addition, the differences in divorce rates and the prevalence of cohabitation are narrowing, as the levels in the Southern European countries are ‘catching up’ to those in other parts of Europe. A similar catch-up process can be observed for childlessness and low fertility. While fertility remains low in German-speaking countries, there are some signs that this trend may be reversing. Meanwhile, childlessness continues to be higher in Southern European countries than elsewhere in Europe. A puzzling recent development is the decline in birth rates in the Nordic countries.

Chia Liu and *Albert Esteve* complement the demographic account of Sobotka and Berghammer by providing an empirical investigation of family forms in contemporary Europe. The overview highlights that regional differences still characterise Europe to some degree. While there has been a slight postponement in leaving home that may be related to the global financial crisis, the co-residence of young adult children and their parents is rare in Western and Northern Europe. Southern and Eastern European countries, most notably Italy, deviate from this pattern, as the children in these countries tend to leave the parental home late; often not until they move in with a partner or spouse. High and growing rates of union dissolution affect the living arrangements in most countries. Children often stay with their mother after a separation. As a result, men are less likely than women to be living with their children. Overall, singlehood in adulthood has become more prevalent across Europe over time. The main drivers of this development are childlessness and union dissolution. However, we also see some decreases in singlehood at older ages. Previously, there were large gender differences in single living at advanced ages. As men’s life expectancy has increased disproportionately in years, the gender gap in singlehood has decreased somewhat.

Pearl A. Dykstra's chapter zooms in on the living arrangements at higher ages. Living arrangements at ages 60 and older have become more diverse, because the separation, divorce, and re-partnering rates at these ages have increased across time. However, we still know relatively little about the ramifications of union disruption at higher ages, and of how such break-ups affect the social and financial well-being of older people. An important dimension of the living arrangements of older people is institutional living at advanced ages. The patterns of institutional living in Europe have converged somewhat across time. Dykstra sees two processes at play in this trend: first, public spending on residential care has been curtailed in countries where institutionalised care was already widespread; and, second, other countries, and particularly Southern and Eastern European countries, have increased their efforts to expand residential care for the elderly.

3.4 Family Transitions in the Life Course

Quantitative family sociology has been dominated by the analysis of single life course transitions, such as the analysis of first birth, first marriage, first divorce, or re-partnering. On the one hand, we can lament that the analysis of these single life course transitions leads to a fragmentation of research perspectives. On the other hand, the focus on a specific event in the life course enables us to cast a nuanced light on family behaviour, and to distinguish the many factors that determine a specific family transition. The rich longitudinal data that have become available across time have also enabled us to model the precursors of family transitions, including investigations that shed light on whether intentions and attitudes are stable across the life course, and how these attitudes affect subsequent family behaviour.

Jan Van Bavel introduces the reader to theories and studies on partner formation. Partnership formation, marriage, and cohabitation are critical life course decisions. They are turning points in an individual's life, because in addition to having a profound impact on the person's emotions and mental well-being, they influence his/her social status and economic standing. In order to formulate theories about partnership behaviour, scholars have reverted to the concept of marriage and partner markets. Partner choices are regarded as rational decisions that are influenced by the needs that a partnership fulfils, the preferences of an individual, and the opportunities and barriers that constrain or enable mating. Scholars disagree about how the increasing education and emancipation of women has changed mating patterns. Women have reached parity in educational attainment in many European countries. However, the repercussions of this development for partner formation have been less profound than was widely expected. The share of couples in which the woman earns more than the man is growing. Furthermore, women's economic standing has become a positive trait on the partner market that influences women's chances of mating in a positive way. However, women's earnings have not reached parity with men's in any European country. As a result, it is still much more common for a woman than for a man to 'partner up' (select a partner with a higher income).

Dimitri Mortelmans provides an overview of the large body of research that has examined union dissolution. While prior research has been limited to the study of marital dissolution, scholars are increasingly including the dissolution of cohabiting unions in their investigations. Nevertheless, official statistics have not kept up with this development, as official sources mainly report marital dissolution rates, which provide an incomplete and often misleading picture of the stability of unions in European countries. So far, there is hardly any research on living-apart-together relationships and their stability. An important finding of recent empiri-

cal research is that union dissolution is closely tied to patterns of social inequality. There is increasing evidence that the relationship between education, income, and union stability is about to change in a profound manner. Whereas, previously, education was only loosely or even positively correlated with divorce and union instability, the association seems to have flipped, with the risk of divorce and separation being concentrated in the lower social strata of society.

Ann Berrington focuses more closely on the above-mentioned increases in the age at first birth that has occurred across Europe (see the chapter by Sobotka and Berghammer). In particular, Berrington highlights that we now have rich longitudinal data on people's fertility intentions that allow us to examine their stability across time; how they change in response to changing constraints; and whether and, if so, under what conditions they lead to action. This type of research has also made significant progress in formulating theories regarding fertility behaviour, mostly by drawing on concepts and theories from psychology. Berrington postulates that advances in this area could be made by adopting a couple perspective in empirical investigations. Another potential avenue for future research is the inclusion of biological factors in the analysis of fertility processes.

Gunnar Andersson's chapter addresses the family transitions – and particularly the fertility transitions – among migrant populations. Like Nauck (see above), Andersson expresses a certain discomfort with prior studies in this area of research. He argues that these studies often overemphasised the role of 'culture' when seeking to explain the behaviour of migrants. While socialisation and cultural traits are assumed to be the key forces that guide migrant behaviour, too little attention is paid to the role of constraints in the destination country. However, some innovative data collection projects have been launched in this area. Comparisons of migrants of the same origin living in different countries of Europe have sharpened our understanding of how the welfare state context and country-specific regulations affect migrants' family well-being and family behaviour. Andersson also points out that official vital statistics data are too limited to map the birth and family dynamics of migrants. As these data only capture the migrants' behaviour after migration, they provide an inconclusive and misleading picture. Thus, using survey data that provide complete migration and family biographies, including information on the migrants' lives before migration, may be more constructive in this context. These data often show that the birth rates of female migrants increase sharply around the time of migration. Further research is needed to determine the factors that lead to these patterns; how they differ by gender, country of origin, and destination country; and how they have changed across time.

3.5 Intimate and Intergenerational Relationships

Intergenerational relationships are core areas of family research. Having knowledge about the support that is provided across generations is crucial for understanding the fabric of our society. Large-scale longitudinal datasets, such as the Survey of Health, Aging and Retirement in Europe, have generated a rich battery of findings on the organisation and practices of many exchanges that occur across the generations, including financial transfers (inter-vivo) as well as care support (e.g., Albertini and Kohli 2009, 2013). As longevity has been growing in European countries, this field of research has clearly expanded its focus. While much of the prior research on this topic focused on the intergenerational relationships of two adjacent generations, recent attention has shifted to the analysis of more distant generations, such as

grandparent–grandchildren relationships. Moreover, the high and increasing divorce and separation rates have inspired a new body of research that has examined the relationship between separated parents and their children, as well as the intergenerational relationships in stepfamilies (e.g., Steinbach and Hank 2016).

Jan Skopek provides a demographic perspective on grandparenthood. In the long historical perspective, the chances of becoming a grandmother or grandfather have increased substantially across time. Grandparents can enjoy more time with their grandchildren than ever before in history. Recent changes in family behaviour, such as increasing childlessness and fertility postponement, are, however, forces that work in opposite directions. Skopek also points out that strong gender and country differences exist in the experience of grandparenthood. Women's life expectancy is higher and women have children at lower ages than men. As a result, grandmothers enjoy more time with their grandchildren than grandfathers. Country differences in the 'exposure' to grandparenthood exist because of differences in longevity and childbearing patterns. Up to the 1970s, the 'shared lifetime' of grandchildren and grandparents went up in European countries, but this trend seems to have levelled off for some countries in recent years.

Ulrike Zartler gives us an account of one of the emerging literatures that deals with parent–child relationships after separation and divorce. A significant body of empirical research has amassed that has examined how children cope with the divorce and separation of their parents, the feelings that a parental break-up evokes, and the factors that may buffer the stress and adverse consequences of the break-up. Zartler calls for more rigorous attention to the child's perspective in the divorce and separation proceedings. This perspective may also generate important insights into the ambivalence about what constitutes family, as the definition may vary greatly between children and (step)parents in post-separation families. Research of this kind adds considerably to previous studies that viewed family as a dynamic entity that is constantly constructed via everyday interactions (see the chapters by Viry and Herz as well as by Widmer in this volume). Substantial controversy still exists about the consequences of divorce and separation for children and parent–child relationships. While some scholars tend to emphasise the adverse effects that divorce and separation have on the well-being of children, other scholars call for the better 'management' of multi-local parenting. Zartler also points out that national (and supranational) policies play a pivotal role in shaping post-separation family life.

Karl Lenz and *Marina A. Adler*'s contribution focuses on a much neglected area of research in the field of intimate and intergenerational relationship: namely, love, emotions, and sexuality. The emergence of 'romantic love' during the nineteenth century has been well documented. Sociological research – in particular through the writings of Luhmann – has also led us to understand love as a 'culture-bound phenomenon'. There has been less sociological research on other types of emotions, such as anger, hate, and guilt. The sociological studies that have examined the consequences of divorce and separation represent an exception (see, e.g., Moore 2020 as well as Zartler in this volume). Interestingly, in the past, sexuality and love/emotions have been seen as separate fields of inquiry. Lenz and Adler call for a better integration of these two strands of research.

3.6 New Insights into the Division of Work in Families

It is a stylised fact that increasing female employment rates have not been accompanied by equal shifts in the division of household labour – a development that recently prompted schol-

ars to argue that the gender revolution is ‘stalled’ or ‘incomplete’ (Esping-Andersen 2009; Hochschild and Machung 1989). This claim was followed by a discussion of what changes might occur once the gender revolution was completed (Goldscheider et al. 2015). Could low fertility, high childlessness levels, and high divorce rates be reversed if greater gender equality was achieved? What is the scope for a more equal division of child care between men and women? Will fathers and mothers ever reach parity in labour market outcomes and time investments in child care?

Anna Matysiak and *Ewa Cukrowska-Torzewska* emphasise in their contribution that in many countries, women have been able to reach parity with men in terms of education. In addition, the employment rates of women have increased significantly. Regardless of this development, large gender differences persist in terms of working hours, income, and labour market status. These differences are conventionally attributed to occupational segregation and discrimination on the labour markets. A large body of research is also devoted to the pivotal role of family policies – in particular, child care and parental leave policies – in explaining the differences in the work patterns of mothers and fathers across countries. However, the authors also point out that we still lack a deep understanding of how gender equality is influenced by labour market policies and recent labour market developments, such as technological changes induced by digitalisation. Moreover, it is still uncertain how the global financial crisis, as well as the Covid-19 crisis, have shifted the economic foundations of the family. While it seems clear that the traditional earner model is a fragile family model in times of crisis, how such crises have affected gender equality and couples’ division of work is less clear.

Oriel Sullivan’s chapter summarises the results of an analysis of time use diary data that cover several European countries, and that contain information for several decades. She confirms that allegedly tedious and repetitive household tasks, such as cleaning and cooking, tend to remain gendered in most European societies. However, men are now more active in child-care activities than they were in previous decades, even though fathers’ participation in paid employment has remained largely unchanged. The Nordic countries continue to be the vanguards of ‘involved fatherhood’. However, the country differences have narrowed – a pattern that has been observed for other areas of family life as well, such as the timing of first childbirth and the prevalence of divorce (see above).

The birth of the first child is a key turning point in a person’s life course, and often leads to a gendered work and care pattern. *Daniela Grunow* illustrates that this tends to occur even in couples in which the woman had previously earned a higher income or had better job prospects than her partner. She emphasises that it is often not the economic rationale alone that determines how a couple’s family life is organised, but the normative prescriptions about what constitutes ‘good’ motherhood and fatherhood in a society. While these patterns differ across countries, it is clear that gender prescriptions continue to have a strong grip on our care and employment behaviour.

Prior studies on the division of housework and care have mainly focused on heterosexual couples. As well as representing a family form that has attracted the attention of researchers studying the diversity of living arrangements, same-sex couples constitute a suitable test case for analysing gender role theories. *Marie Evertsson*, *Madeleine Eriksson Kirsch*, and *Allison Geerts* summarise in their chapter the qualitative as well as quantitative studies in this area of research. The evidence suggests that while there is some specialisation in these families, same-sex parents tend to organise their work and care responsibilities more equally than different-sex parents. In heterosexual partnerships, an initial disadvantage, such as having

a lower wage, often perpetuates traditional care patterns. This does not seem to be the case for same-sex couples, as they are better able to restore equality in the division of household tasks and paid work.

When seeking to provide a theoretical basis for work and care patterns, it is common among sociologists to draw on the classical ‘specialisation model’ of Gary Becker. This model emphasises the ‘efficiency gains’ of an unequal division of household labour and paid employment. *Wendy Sigle* reminds us in her chapter that we should be careful when drawing on this outdated framework. Becker’s specialisation model makes assumptions that are similar to those of the structural-functional theories of sociology. As in these models, the point of departure of Becker’s model is the belief that an unequal division of care and paid work is a superior and efficient way to organise family life. Sociologists have developed alternative theories, such as the ‘doing gender’ approach that highlights how internalised norms determine gendered work-care patterns (West and Zimmerman 1987). However, these approaches are often employed only as a counterpoint to the specialisation model, and have not led to a real paradigm shift.

3.7 Family and Society

Family behaviour and family well-being are strongly influenced by larger societal trends (such as individualisation, digitalisation, migration, and growing social inequality), and by significant period effects (including the global financial crisis, or, more recently, the Covid-19 crisis). Social policies may respond to these trends, and help to ameliorate some of the adverse consequences that large economic and societal trends have for family well-being. National policies may facilitate or hinder certain developments. This is most evident in the area of ART. All countries are committed to increasing family well-being and reducing family and child poverty. Despite these shared commitments, European countries differ sharply in the approaches they use to accomplish their goals. Europe is still a ‘patchwork quilt’ with regard to family support and family policies, despite some modest efforts of the European Union to harmonise policies, such as its target to increase child-care availability for children under the age of three.

Jonathan Bradshaw and *Rense Nieuwenhuis* provide an overview of child poverty in European countries. The harmonised Eurostat dataset, with its rich pool of poverty indicators, allows us to shed a nuanced light on variations in family well-being across countries. However, depending on the indicators used, the country ranking differs greatly. Overall, child poverty seems to have risen disproportionately since the global financial crisis. Bradshaw and Nieuwenhuis illustrate the importance of states implementing measures for reducing child poverty in response to this development. Mothers’ integration into employment is important to shield families from poverty. However, the authors also alert us that in many European societies, a growing fraction of the population are ‘working poor’.

Jasmin Passet-Wittig and *Martin Bujard* provide an account of the research in the area of MAR. MAR includes ART as well as ‘softer’ measures, such as assisted insemination or hormonal treatments, that enable couples to fulfil their desires to have children. Up to today, there are large discrepancies in how European countries regulate MAR and, more specifically, ART. This variation is probably most evident for surrogacy, which is allowed in only a few European countries, such as the United Kingdom and the Czech Republic. The great variation that exists in the legal frameworks raises important ethical questions, not least because

cross-border travel to access ART services can hardly be controlled. Moreover, the funding of MAR treatments differs greatly across countries. As a result, some countries are laggards in this development, while others are taking the lead. Interestingly, there is no clear regional pattern or any variation that matches any prior categorisation. Currently, Denmark, Spain, Greece, and the Czech Republic are taking the lead in ART. Apart from these large country differences, there are concerns about social differences in access to and usage of MAR.

Laura Merla, Majella Kilkey, Raelene Wilding, and Loretta Baldassar provide an overview of the state of the art in transnational family research. Transnational family research marks an important paradigm shift in migration research. Whereas, previously, migration was often conceptualised as a ‘one-shot event’, the ‘transnational turn’ has sharpened our awareness that migration is a more complex undertaking. Migration may be temporary or circular. Some migrants may cut their ties with their country of origin, but in most cases, close ties and interactions with people in the country of origin continue beyond migration. This is particularly likely to be the case if close family members, such as children, partners, or spouses, remain in the country of origin. Family networks as well as care for children and for the elderly may extend beyond national borders. Advances in information and communication technologies, such as text messaging and video calls, have made it easier for migrants to stay in close contact with family members in the country of origin (or in other countries or places). Transnational families raise important social policy issues, such as the portability of pension rights, the transferability of family benefits across borders, and access to care facilities for transnational families.

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PART II

THEORETICAL ADVANCES IN FAMILY RESEARCH

2. Welfare state regimes, family policies, and family behaviour

Gerda Neyer

1. INTRODUCTION

The past three decades saw an enormous increase in research on welfare states, family policies, and families. There is hardly any comparative or single-country study on European families that does not refer to welfare states or family policies. The rapid growth of the field is also reflected in the large number of handbooks on family policies, the welfare state, and social policies that have been published during the past decade (e.g., Blum et al 2019; Castles et al. 2010; Eydal and Rostgaard 2018; Greve 2019; Robila 2014; Shaver 2018). Given the enormous body of literature and the breadth of topics covered in this research field, this contribution must be limited to specific aspects of it. The main purpose of this chapter is to provide an overview of the developments and the core research in this area, and to outline some new directions for family research. The chapter is further limited by its primary focus on research on European welfare states, and on Western European countries in particular. Chapters in other handbooks on family policies, welfare states, and social policies usually provide overviews of developments in family policies, of differences in policies across welfare states, or of employment-care regulations in different welfare regimes or welfare states. To complement these contributions, the present chapter also deals with the influence of welfare states and family policies on family behaviour and family outcomes. In particular, it addresses the methodological issues involved in such research. Throughout this chapter, family behaviour refers to family events, such as childbirth, or union formation. Family outcomes refers to aggregated measures of family issues, such as the total fertility rate, or the share of childlessness in a society. The examples in the methodological section of this chapter are primarily taken from quantitative family demographic research, with a focus on parental leave and childcare policies. Theoretical discourses on the links between welfare states, family policies, and families have focused on these two policies. Moreover, parental leave and childcare policies have also formed the core of family and gender policy initiatives at the European Union (EU) and national levels. The chapter first presents a very abridged summary of research prior to Esping-Andersen's influential work on welfare regimes with the aim of noting the scientific approach that the conceptualisation of welfare regimes brought to social research on welfare states, family policies, and families. This is followed by a presentation of methodological issues and examples of quantitative research on the association between welfare states, family policies, and families. The chapter concludes with a discussion of new research directions that are made necessary by changes in welfare states.

2. COMPARATIVE WELFARE STATE RESEARCH – ORIGINS AND DEVELOPMENTS: THE FAMILY IN EARLY WELFARE STATE RESEARCH

The welfare state has its roots in the family. This statement may come as a surprise to some readers, since most welfare state research associates the birth of the welfare state with the introduction of compulsory health, accident, invalidity, and old-age insurance schemes in Germany in the 1880s. However, the first welfare state policies enacted in the first half of the nineteenth century targeted widows and orphans, as well as working women and children. At that time, there were growing concerns about how the loss of the main earner in a family, or children and women working in factories, might affect the health of the working-class families and of future generations, as well as men's working conditions and wages. These concerns led to the introduction of the first welfare state measures, such as limitations on working hours, restrictions on health-endangering work by children, prohibitions on women working after childbirth, and widows' pensions (Kessler-Harris et al. 1995).

Despite the essential role that family issues played in the foundation of the welfare state, research on the welfare state has often failed to deal with the family in its own right. Most welfare state studies focused on the role social policies played in addressing the consequences of capitalist production. Social policies were seen as a means to relieve the family of having to bear the costs of economic changes through social insurance and the protection of the male worker and his income (see, e.g., Flora and Heidenheimer 1982a; Wilensky 1975). This line of research recognised the need to analyse social policies with respect to their redistribution and their equality aims; i.e., whether social benefit claims can be made on the basis of social citizenship, and whether social policies are designed to provide equal opportunities or equal outcomes (Flora and Heidenheimer 1982b).

Feminist social scientists of the 1970s and 1980s turned the focus of welfare state research towards the family. Their core concern was how welfare states regulate family lives, and women's lives in particular. Specifically, they looked at how welfare states acknowledge reproduction and women's unpaid work, and either bind women to or relieve them from family work and dependence on men. Continental European and Scandinavian feminists tended to view the welfare state quite differently. This was partly because most researchers analysed the social policies and welfare state orientations of the country in which they lived. Moreover, feminist researchers had a scientific as well as a political agenda. Identifying and analysing the specifics of the family blindness, gender bias, and patriarchal nature of each welfare state were integral to the efforts of feminists to change the welfare state and the conditions of women's lives. German researchers, for example, argued that the welfare state privileges the male breadwinner and marriage by familialising women, cementing gender inequalities in the family and in work, prolonging women's dependence on their husbands, and contributing to women's poverty throughout the life course (see, e.g., Kickbusch and Riedmüller 1984). Scandinavian feminists, by contrast, saw the welfare state as a potential source of power for women in their struggle to achieve gender equality in the family and in the public sphere. They argued that a woman's dual role as family carer and worker makes her more dependent on the welfare state than a man, and that the welfare state could be an ally for women in their struggle to become independent of men. The goal of feminist research and political activism should therefore be to work towards a 'women-friendly welfare state' that supports a gender-equal division of work and family obligations (see, e.g., Hernes 1987).

3. THE THREE WORLDS OF WELFARE: A COMPARATIVE FRAMEWORK

Feminist welfare state research viewed the welfare state from the perspective of women's status in the family. In this sense, it moved the family to the centre of welfare state research. Esping-Andersen (1990) integrated the family conceptually into his comparative framework of welfare regimes in his seminal book *The Three Worlds of Welfare Capitalism*. Through his work, Esping-Andersen made several path-breaking contributions to the research field. First, he viewed the state, the market, and the family as interlocked in the provision of welfare. Second, he grouped European welfare states according to the intentions of their social policies and the principles on which they were based. Third, he moved welfare state research from a focus on national social policies to a focus on the common features that characterise different welfare regimes. Fourth, he provided a basis for comparative welfare state research that became the dominant research approach in the subsequent decades. His classic distinction between *social-democratic* or *universalistic* welfare states (the Nordic countries), *conservative-corporatist* welfare states (continental Western European countries), and *liberal* welfare states (Anglo-Saxon countries) has become a common reference point in social science and family research involving welfare states.

Viewed from a family research perspective, *social-democratic welfare states* seek to promote social equality and the independence of individuals from family support. In these states, social policies are individual-based and social service-oriented. The aims of these policies are to relieve the family of the obligation to provide welfare, to reduce social and employment-related risks, and to provide high living standards for everyone. Most social security benefits are granted on the basis of individual social citizenship rights, usually independent of family relations and of the economic capacities of other family members. *Conservative welfare states* direct their social policies towards status maintenance and the preservation of traditional family forms. In these states, social benefits correspond to work performance, as measured by the level and the duration of contributions to social security systems; or they depend on marriage. Conservative welfare states rely heavily on the family as a provider of welfare and social services. *Liberal welfare states* encourage market-based individualism by providing minimal social benefits and by subsidising private and marketised welfare schemes. In these states, social benefits are usually means-tested and poverty-related, and social services are market-based or privately provided.

Some researchers have argued that continental Western European countries are too diverse to be grouped into a single conservative-corporatist welfare regime. It has, for example, been pointed out that due to their stronger reliance on kin and their clientelism, Southern European welfare states could be viewed as representing a separate *Mediterranean* or *Southern European* welfare regime (Ferrera 1996). It has also been observed that the Netherlands and Switzerland deviate from the ideal conservative-corporatist regime type, and could thus be characterised as *hybrid liberal-conservative* welfare states (Arts and Gelissen 2002). Post-communist Eastern European countries have been added as distinct *Eastern European* regime types (Cerami and Vanhuyse 2009). East Asian and Latin American countries are increasingly viewed as representing either separate welfare regimes (e.g., the *Confucian* welfare regime in East Asia) or regimes that are developing in the direction of one of the classic welfare regimes (Robila 2014; Arts and Gelissen 2010).

Esping-Andersen built his original typology on three principles. The main principle is *de-commodification*. This is also the primary principle governing the modifications and extensions of the three core welfare regimes. De-commodification is the extent to which social policies reduce workers' dependence on the market, generally by providing workers with the right to claim social security benefits so that they can support themselves without having to rely on the market. The other two principles are *stratification*, which refers to the extent to which social policies promote and maintain class structures in society; and *social citizenship*, which refers to whether access to social benefits is granted as an individual right, or is based on need (Esping-Andersen 1990).

3.1 Bringing Family Policies and Families into Welfare Regime Research

Feminist and gender researchers have pointed out that these principles and the classification of welfare states were primarily based on labour market and class perspectives. The family remained a residual category, not least because the typology of welfare regimes was mainly built on social policies that cover old age, sickness, and unemployment. Family policies, including those related to de-commodification, such as maternity leave or parental leave, were not taken into account. As a consequence, the family was seen as disconnected from welfare state policies and the labour market. Family and gender issues were viewed as private, apolitical matters, and thus vanished from welfare state analyses. In line with their approaches to social policy and family research in the 1970s and 1980s, feminist and gender researchers moved the family, gender, and family policies to the centre of welfare state classifications and integrated them into the welfare regime typology (e.g., Lewis 1992). These researchers introduced core principles that govern welfare state and family policy approaches to families and gender: *commodification*, that is, the extent to which family policies constrain or support the employment of women, and especially of mothers (Orloff 1993); *dependence on or independence of social security*, that is, whether social security coverage and social and family benefits are granted to each family member on the basis of individual social citizenship rights, or whether (non-employed) family members depend on a (male) breadwinner's coverage (Langan and Ostner 1991; Lewis 1992); *care* as an essential component of family and welfare state provision (Knijn and Kremer 1997); and *familialisation* or *de-familialisation*, that is, the extent to which welfare states relieve the family of care responsibilities or support family care directly or indirectly through family policies (Esping-Andersen 1999; Leitner 2003). Incorporating these dimensions into welfare state classifications and viewing 'welfare regimes through the analytical lens of the family' (Esping-Andersen 1999, p. 49) has significantly advanced comparative welfare state, family policy, and family research. Three aspects of this shift are particularly noteworthy, as they altered how family policies and families are conceived.

First, family policies are now considered a central constituent of a welfare state, alongside other social policies. Analyses of welfare states or of welfare regimes usually include, or at least acknowledge, family policies; for example, in investigations of or reflections on the extent to which different welfare states stratify society or contribute to social (in)equality. Likewise, analyses of family policies usually consider the welfare state or welfare regime context in which the policies are situated in order to properly assess the range or consequences of family policies.

Second, the perception of family policies has changed. Kamerman and Kahn (1978) defined family policies as everything that government does to and for the family. They saw them as the sum of all state activities directed towards the family. Based on this notion, family policies are usually assessed according to their ‘generosity’, such as the share of the gross domestic product devoted to these policies or the share of social spending allocated to families. Researchers now highlight the structuring function of family policies and the principles and aims on which they are based. They focus on how family policies shape gender, class, race/ethnicity, and other social, economic, and private relationships in society and the cultural and ideological understandings of family and gender behaviour (Pfau-Effinger 1998, 2005). In essence, they define family policies as those that structure the labour market and society by structuring family life and family behaviour along gender lines. Rather than using a compound measure for family policies, they assess the aims, functions, and effects that different family policies have on individuals, families, and society (see, e.g., Gornick and Smeeding 2018; Thévenon 2011).

Third, since different family policies address different family issues, the family is no longer conceived of as a single entity. Instead, researchers have distinguished between the different relationships of which families are composed, such as partnerships and parenthood, and, increasingly, intergenerational relationships (Saraceno 2008). They have further distinguished between different family forms, such as marriage, cohabitation, same-sex partnerships, dual or single parenthood, and complex or reconstituted families, and have assessed to what extent family policies prioritise specific family forms, ease or hamper specific family behaviour, and acknowledge family diversity.

The classification of welfare regimes becomes more diverse if family policies and their structuring functions of family behaviour are taken into account, including how they have changed over time. As women’s levels of education and employment have increased, gender roles have changed, non-marital childbearing and sole parenthood have become more common, fertility levels have decreased, and populations have grown older, the focus of family policies has shifted away from providing cash benefits and income supplements towards facilitating work–family reconciliation. The developments in cash-centred family policies and in work–family reconciliation policies have not been uniform across Europe (see, e.g., Daly and Ferragina 2018; Ferrarini 2006; Gauthier 2002; Gornick and Meyers 2003; Morgan 2012). Due to the EU Directives on parental leave and work–life balance for parents and carers, all EU member states have implemented gender-neutral parental leaves. However, across the EU member states, these leaves vary substantially in terms of duration, type (flat-rate or income-based), and financial compensation levels, qualification criteria, and incentives for fathers to participate in care (International Leave Network, www.leavenetwork.org; Moss et al. 2020). Parents also have the right to request flexible working arrangements, and to take care leave if their child has special care needs. Moreover, the EU encourages member states to provide leave benefits to individuals who are caring for relatives other than children. The policy options and conditions for these benefits again vary greatly across the EU member states (see International Leave Network, www.leavenetwork.org).

The Barcelona Target of 2002 called for EU member states to provide childcare for 33 per cent of children below age three and for 90 per cent of children between age three and school entry age by 2010. While the rates of enrolment in formal childcare (public, private, or childminders) have indeed increased, particularly for children aged 0–2, the levels of coverage still vary substantially among countries. In several countries, the enrolment rates are far

below the target, and the hours of childcare available to families also differ greatly (Rostgaard 2018). The different patterns of converging and diverging family policy developments across European countries, and the great diversity and often ambivalent or contradictory work–family orientations of family policies within each country, make it difficult to compare countries and to classify them into regimes.

Researchers have mainly concentrated on three policy directions: first, policy support for women's employment and work–life balance; second, the availability of social care services and de-familialisation; and, third, policy support for dual earner-dual carer families and for gender role changes. Initial studies used these family policy features to assess the consistency of Esping-Andersen's three worlds of welfare. These authors proposed different regime classifications: e.g., gender regimes; care regimes; male breadwinner, earner-carer, and dual earner-dual carer regimes; and direct and indirect familialisation regimes (see, e.g., Leitner 2003; Sainsbury 1999; Saraceno and Keck 2010). A large body of literature has since investigated whether changes in family policies or the inclusion of other family-relevant aspects – such as class, education, occupation, poverty rates, gender wage gaps, agency inequalities or capability sets – lead to different regime constellations (see, e.g., Hobson and Fahlén 2009; Korpi 2000; Korpi et al. 2013; Mandel and Semyonov 2005). All of these studies have found surprisingly consistent patterns of welfare state classifications, but also variations in patterns depending on which family policies or policy packages are analysed.

Researchers commonly find that the Nordic countries and the liberal welfare states differ from the continental conservative and Mediterranean welfare regimes. The Nordic countries generally support gender-equal participation in work and care. They most consistently de-familialise care by providing universal coverage of institutional care for both children and the elderly. However, the once homogeneous orientation towards the gender-equal earner-carer family has been somewhat eroded through the introduction of care leave benefits in Finland (1990) and in Norway (1998). In liberal welfare states, work–family balance depends more on the financial and employment circumstances of the individual or the family, and on market-provided care. Among the continental conservative Western European welfare states, researchers commonly distinguish between several groups: Belgium and France, which have a long tradition of supporting mothers' employment. They offer extensive day care and pre-school for children, and de-familialise care to a greater extent than other continental European countries. Germany and Austria, which used to support the gendered division of work and care but shifted away from a focus on familialising policies, albeit to differing degrees. In 2007, Germany replaced its care leave by an income-related parental leave. Between 2000 and 2010, Austria extended and layered its care leave and added an income-related parental leave option (Leitner 2011). Both countries still rely heavily on care provided by the parents, as institutional childcare is mainly available on a part-time basis only. Southern European countries offer little support for mothers' employment or for work–life balance. They neither de-familialise nor explicitly familialise childcare through their family policies (Saraceno 2016). The family policies of the Netherlands and Switzerland lie between those of the liberal and conservative regimes. The work–life family policies of Eastern European countries have oscillated between familialising and gendering work–life balance by providing long periods of leave, and supporting employment-oriented family behaviour by providing income-related parental leave benefits. Most Eastern European countries de-institutionalised childcare and have low childcare coverage (Saxonberg and Sirovátka 2006). Overall, in Europe, family policies concerning care for young children seem to converge towards facilitating familialised

care through parental leave benefits, complemented with institutionalised care provided by care services (Daly and Ferragina 2018; Gauthier 2002). The parental leave regulations of the European countries include options for fathers to provide care, but the majority of European countries do not directly and consistently promote greater gender equality in the family and a de-gendering of men's family behaviour. The familialisation of care is even partly associated with a re-gendering of care, as the countries with the longest parental leave periods (especially in Eastern Europe) offer the fewest options for fathers to take leave (see, e.g., the contributions in Eydal and Rostgaard 2018).

A new development in family care arrangements in Europe that lies in-between marketised or state-supported forms of familialisation and de-familialisation is the recent growth in transnational care services, especially for elderly care. Several Western European welfare states, such as Austria, Italy, Germany, Italy, Spain, the Netherlands, Finland, and Sweden, have introduced tax breaks or cash benefits for those in need of care or home help (Williams 2012). This care is often provided by female migrant care workers from Eastern European countries. These workers frequently live with the person or family they are caring for, leaving their own family behind in their home country. These care services constitute new marketised, privatised, or institutionalised transnational forms of care that occupy a space between the 'familialisation' of care in Western countries and the 'de-familialisation' of care in Eastern European countries (Williams 2012; Hobson et al. 2018; see also Merla et al. in this volume).

Given the ambiguities in family policies and the development of transnational care services, researchers have pointed out that when shifts occur in the family policy schemes of a country, efforts to classify the family policies into family policy regimes should take into account the degree to which a country simultaneously provides forms of gender segregating and familialising family support, such as cash, tax, or care leave benefits; and gender-equity and employment-oriented support, such as income-related parental leave and high levels of childcare coverage (Ferrarini 2006; Korpi et al. 2013). Such distinctions can provide a more nuanced picture of how family policies vary within or across welfare regimes.

Viewed from a family research perspective, gender- and family-oriented welfare state researchers have introduced the family in a more subtle way into welfare regime classifications. They have shifted the focus on the employment–care nexus as the core of welfare state policies, and have put the emphasis on the conditions that welfare states and family policies set for human agency. These contributions have broadened the range of research on the links between welfare states, family policies, family behaviour, and family outcomes; in particular by theoretically linking the institutional context (welfare state) and its policy instruments (family policies) to individual behaviour and outcome.

4. ANALYSING WELFARE STATES, FAMILY POLICIES, AND THE FAMILY

4.1 The Welfare State and the Family

Esping-Andersen (1990) laid the groundwork for new approaches in comparative welfare state research by basing the classification of welfare states on common dimensions. The welfare regime concept captures the institutional configurations of welfare states and their normative underpinnings with respect to stratification and social equality, social rights, and

de-commodification principles. Gender and family policy researchers have shown that welfare state and family policy regimes are aligned, albeit to varying degrees, depending on the country and on the family policies that are included in the regime classification. While these similarities and differences broaden the scope for family research, some limitations can also be observed.

First, unlike family policies, which may be amended, reformed, or abolished, welfare states have what Pierson calls ‘institutional stickiness’ (Pierson 2001). They tend to change slowly and incrementally. Even if they undertake radical and paradigmatic reforms in some policy areas, countries usually remain in their respective welfare regimes. Thus, a country’s welfare regime can be seen as providing a comprehensive and structured description of the long-term institutional arrangements and the contextual conditions in a country. Because of the principles on which they are based and their cultural underpinnings, welfare regimes provide an analytical and theoretical framework for comparative, cross-country, and single-country studies of family behaviour and family outcome. However, their comprehensiveness and path persistence also make it difficult to observe and measure the direct influence of welfare states or welfare regimes on individual family behaviour (Mayer and Schöpfli 1989).

There are basically three ways in which welfare states or regimes have been applied in family research. First, in multi-country comparative family research, welfare regimes have been used to explain differences in family outcomes across countries by attributing them to the different welfare regime contexts. In this line of research, welfare regimes enter research *a posteriori*, in the interpretation of country-specific results. These studies implicitly or explicitly start with the assumption that welfare states structure life courses (Mayer and Schöpfli 1989; see also Konietzka and Kreyenfeld in this volume). Therefore, similar contextual conditions should result in similar family patterns in countries that belong to the same welfare regime, and family outcomes should vary across countries that belong to different welfare regimes.

A second line of family research uses welfare regimes to compare family behaviour or family outcomes in a structured research design. These authors commonly apply a ‘most-different’ or a ‘most-similar system design’ approach (Przeworski and Teune 1970). In the most-different system design approach, researchers either select one or more countries from each welfare regime as representatives of the respective regime – e.g., Germany, Sweden, and the United Kingdom – or they pool the data of the countries belonging to the same welfare regime to analyse family behaviour or family outcomes across welfare regimes. In this line of research, welfare regimes enter research *a priori*, in the selection of or the pooling of countries for the analyses. The assumption of researchers using a most-different system design is that family behaviour or family outcomes should vary across the countries or country clusters that represent the welfare regimes, because of the different institutional and cultural contexts that these regimes provide for families. Researchers who apply a most-similar system research design usually investigate family behaviour or family outcomes in countries that belong to the same welfare regime. Similar results for these countries could then be interpreted with reference to the similar welfare state conditions, or taken as an indicator for the structuring strength of the welfare state vis-à-vis other behaviour-shaping institutions, such as religion. Differences in the results across the countries would signal that other social, cultural, or economic forces were at work that produced the different family outcomes.

A third line of research investigates family behaviour or outcomes in a single country. The reference to the welfare regime to which this country belongs serves as a summary of the contextual conditions in this country. It also places the country within a larger context

(especially if the country is small, and is, therefore, not one of the large European countries that receive considerable attention from researchers). Situating the country within the broader welfare regime concept increases the options for interpreting the results. The findings can be interpreted as country-specific; but they can also be used to draw inferences about other countries belonging to the same welfare regime. Finally, interpreting the findings from a welfare perspective can reduce the temptation to universalise results that are specific to this particular country or welfare regime.

4.2 Family Policies and the Family

Research on the links between family policies and families may be broadly categorised into two groups: one group of studies that focus on the macro-level relationship between family policies and family outcome, and another group of studies that take an individual-level approach. Some of these studies explore explicitly how family policies shape family behaviour, while other studies do not investigate the role of family policies directly, but simply refer to family policies when seeking to explain certain family behaviour. The approaches of these two groups differ in terms of design, methodology, and explanatory range with respect to family behaviour.

Macro-level approaches assess the association between aggregate indicators of family policies and of (macro-)family outcomes. Among the indicators commonly used to assess family policies are, for example, spending on families in total; cash allowances, tax breaks, or services; the number of paid weeks of maternity or parental leave; the income replacement rate during maternity or parental leave; the enrolment rate of children of different age groups in public childcare; and the level of marriage or birth subsidies. The unit of analysis is usually the national level. In this area of research, there are three major approaches. The first is exploratory and seeks to find a tentative explanation for cross-country differences in family outcomes by looking at family policies. This line of research may be connected to presenting a new database, or a systematic collection of policies or descriptions of country policies that have not been available before (see, e.g., Saraceno and Keck 2010). Another, partly overlapping line of research aims to provide empirical evidence for theoretical assumptions about the correlation between family policies and family outcomes, such as the link between a country's spending on childcare and women's employment. These studies provide an indication that the family policies and family outcomes covered in the study may be related to each other. However, as is well known, many fallacies can arise when using macro-correlation to make causal claims.

In studying the link between family policies and family behaviour, researchers are confronted with a number of methodological issues that make conducting this research both intriguing and difficult. Hoem (2008) and Neyer and Andersson (2008) have discussed these issues with respect to the impact of family policies on fertility. Their insights also apply to other aspects of family behaviour. Hoem (2008) identified four methodological challenges. The first concerns data and measurement issues. Aggregate data, like period rates (e.g., period total fertility rate, annual female labour force participation rates) are rather broad and insufficient measures for assessing the impact of policies on behaviour. The second issue is that the cause-effect relationship may be reversed. Policies may be enacted because of a demand or an ongoing or anticipated development. Failing to account for this possibility may lead to false conclusions or to an overestimation of an effect. A third problem is that there are often no counterfactuals that would allow researchers to assess what would have happened if the

policy had not been introduced. In the absence of a true counterfactual, it is difficult to measure the true strength of a policy effect. Hoem (2008) used findings from studies on the effects of parental leave benefits in Sweden and care leave benefits in Finland during the economic crisis of the 1990s to illustrate the problem. He argued that the Swedish income-related parental leave policy led to the decline in fertility during the economic crisis; while the Finnish home care allowance, which could be taken up to a child's third birthday, prevented a decline during the economic crisis. If a researcher had only studied the effect on fertility of the home care allowance in Finland, s/he might have concluded that it had no impact on childbearing, as fertility had remained rather constant over the observation period.

The examples of fertility developments in Sweden and Finland during the economic crisis may also serve as an example of the fourth problem that Hoem (2008) addresses: namely, that policies operate within specific contexts. Thus, the effects of policies on family behaviour cannot be isolated from the social, economic, cultural, and policy contexts in which they are embedded. Even identical policies enacted in different welfare states may not have the same effects (Neyer and Andersson 2008). By extension, if similar family policies are found to have similar effects in different welfare states, this observation may strengthen the assumptions about a causal connection between the family policy and behaviour. Disentangling the cultural, economic, and policy contexts in order to determine the influence of a specific family policy on family behaviour remains challenging for family researchers. These difficulties may be due not only to data availability and methodological issues, but to the policy and the policy process itself. For example, a family policy may have been implemented or amended together with other policies that may also affect family behaviour. Such 'policy packages' are often used to tackle an economic crisis. However, it may be difficult to isolate the effects of family policies that were concurrently implemented with other social policies. Moreover, policies may be designed for purposes other than to address family issues, and they may be designed to have no effect. Alternatively, policies could have unintended consequences for family behaviour. Thus, having detailed knowledge of the design, history, and implementation of policies is a prerequisite for being able to disentangle the contextual and policy effects.

To reduce the complexity of studying the effects of family policies, Neyer and Andersson (2008) have presented several strategies related to different types of family policies. One approach is to study whether a significant policy change, a so-called 'critical juncture' (Hall 1993; Thelen 1999), alters family behaviour; and conversely, whether a significant change in environmental conditions affects family behaviour. A much cited example of the effect of a critical juncture is the 'speed premium' in Sweden, whereby parents shortened their birth intervals after a reform of parental leave regulations that benefited parents who had their second or subsequent child within a certain period of time after the previous birth (Hoem 1993). An extension of parental leave in Austria from one to two years had a similar, albeit unintended effect on birth spacing (Lalive and Zweimüller 2009). Economic crises, like those in Sweden and in Finland in the 1990s or the Great Recession, are classic 'critical' events that lend themselves to studying the effects of family policies on family behaviour under different conditions.

Recent findings also indicate the need to study the sequencing of 'critical junctures' in order to properly assess the impact of family policies on family behaviour. Duvander and Johansson (2012) showed that two reforms of the Swedish parental leave designed to encourage fathers to take leave had different effects on fathers' uptake of leave, and on the social differences among the fathers who took leave. In a comparison of fertility trends after the economic crises in the

1990s and the Great Recession of 2008 in the Nordic countries, Comolli et al. (2021) found that there were rather different reactions to the crises in childbearing in the various Nordic countries and in the different educational groups. This study also illustrates the importance of carefully considering the interactions between family policies and other social and economic developments, and of assessing them in a wider context.

The critical juncture approach may not be suitable or may have to be modified for investigations of family policies that develop incrementally. For example, if a policy like parental leave is introduced step-wise, the researcher needs to interpret the development of family behaviour over the entire implementation period in order to understand the potential impact of the policy change. Applying a critical juncture approach is also not appropriate if policies develop ‘unevenly’ across regions, such as the provision of childcare. In cases like these, the spatial variation across regions or municipalities can be exploited (Andersson et al. 2004; Neyer and Andersson 2008).

A fourth issue that can arise concerns the uptake of family policies. A number of studies have investigated how taking advantage of a policy can affect family behaviour. To conduct this kind of research, variation over the study population is needed. For example, the family behaviour of those who take advantage of a policy, receive a benefit, or participate in a programme may be compared with the family behaviour of those who do not. A similar approach is to explore whether family behaviour differs by the duration of uptake, the length of participation, or the benefit level (Duvander et al. 2019).

A fifth issue to consider is that family policies are not uni-directional (Korpi 2000). The different family policies of a country may pursue different aims, and may be ambiguous or even contradictory. For example, while high levels of cash benefits for children or tax reductions for a sole earner can prevent poverty, they may also discourage the uptake of employment if the economic gains from employment are marginal due to low wages and high childcare costs. In general, quantitative studies on the effects of family policies on family behaviour do not account for such ambivalence, not least due to the lack of proper data. However, as family policies become more diverse, there is a need to develop family research in the direction of simultaneously contradicting policies when studying the effect of family policies on family behaviour.

The examples and methodological considerations above relate to quantitative research. Apart from data issues, quantitative policy research also suffers from the problem that studies that find that policies have no effect are seldom published, even if the data and the modelling are outstanding. This ‘publication bias’ greatly limits our understanding of how welfare states, family policies, and family behaviour are interlinked from both a research and policy-making perspective. Qualitative research can partly fill this gap. The advantage of using a qualitative approach in policy research is that it allows researchers to consider aspects that are often not available in surveys or register data, such as personal circumstances, family characteristics, workplace or network relationships, cultural and normative considerations, and details or interactions of policies that may facilitate or hamper the use of a policy (Brinton et al. 2018; Haas and Hwang 2019). Mixed-methods approaches have become a useful way to fuse the strengths of quantitative and qualitative research, and to gain a comprehensive understanding of how welfare states and family policies shape family behaviour (Grunow and Evertsson 2016, 2019).

5. NEW DIRECTIONS IN RESEARCH ON WELFARE STATES, FAMILY POLICIES, AND FAMILY BEHAVIOUR

5.1 Varieties of Capitalism, Institutional Complementarities, and Family Research

Recent developments in welfare state research and new challenges to the welfare state have led researchers to reassess and to take a broader view of the links between welfare states, family policies, and family behaviour. Esping-Andersen (1990) built his welfare regime on the inter-relationship between state, market, and family in providing welfare. He focused on the state; that is, on social policies. Subsequent gender and family researchers focused on the family and on family policies. The varieties of capitalism (VOC) approach makes the market and firms the centre of analysis (Hall and Soskice 2001). It stresses that labour markets in different welfare regimes are organised differently, and that these differences may lead to differences in employment, educational, and family behaviour. Therefore, VOC researchers emphasise the need to consider ‘institutional complementarities’; that is, how different institutions in welfare states complement or contradict each other.

For family sociology, the VOC approach opens up new perspectives and directions for research on welfare states, family policies, and family behaviour. It first suggests that researchers pay more attention to internal aspects of the labour market, and consider to what extent conditions at the sector, industry, company, firm, or workplace level shape family behaviour. This may be particularly necessary in liberal and hybrid welfare states, in which family and social policy benefits are largely company- or sector-specific, rather than nationally legislated (Haas and Hwang 2019). Even in conservative welfare states, there are usually differences in levels of social and family policy protection; e.g., between the public and the private sectors, and collective agreements may complement existing national statutory family policy regulations. Internal labour market conditions – such as more or less structured paths of career or employment advancement – may affect family behaviour, and lead to different family outcomes for employees in different labour market segments. To identify these effects and their driving forces, it may be necessary to more explicitly examine ‘institutional complementarities’, and to study how the cumulative conditions of different institutions affect family behaviour and family outcomes (Palme 2006). Such an approach may prove indispensable given the ongoing liberalisation of the labour market, and the efforts to change the welfare state into a ‘social investment welfare state’.

5.2 New Social Risks, the Social Investment Welfare State, and the Family

Welfare state researchers generally agree that economic, demographic, social, and family-related changes have altered the conditions for welfare states, and have increased the pressure to develop new or modified welfare policies (Mills and Blossfeld 2013). Family-related shifts such as growing family complexity and increases in non-marital birth rates, union instability, and sole motherhood may give rise to ‘new social risks’, since such family forms are often insufficiently covered by ‘traditional’ social security policies (Bonoli 2005; Esping-Andersen et al. 2002). Welfare state protection is usually tied to life-long employment. These ‘new social risks’ are associated with circumstances that lead to interrupted, shortened, or income-reduced employment histories over the life course, such as having to take on care obligations and family work. Therefore, welfare states are increasingly changing their social policies away

from providing ‘passive’ protection in the case of ‘de-commodification’ and towards implementing ‘social investment policies’; that is, activating employment capacities through active labour market policies, the expansion of childcare and early childhood education, increases in flexible education opportunities, and the promotion of life-long learning and skills acquisition (Morel et al. 2012). From the Lisbon Strategy in 2000 to the Social Investment Package of 2013, the social policy strategies of the EU supported this restructuring of European welfare states towards the strengthening of individual human capacities and the promotion of employability throughout the life course, irrespective of an individual’s or a family’s situation or care obligations. This shift towards the development of ‘social investment welfare states’ has been accompanied by a more restrictive approach to social transfers, whereby the receipt of social benefits is increasingly tied to participation in activation or educational programmes (Hemerijck 2017; Morel et al. 2012; see also Bradshaw and Nieuwenhuis in this volume).

The turn towards a social investment welfare state poses particular challenges for the conservative-corporatist welfare states of continental Europe. Their familialism and social class differentiation is at odds with the aims of a social investment welfare state to activate people, promote work–family reconciliation, and increase levels of gender and social equality. In contrast, the Nordic countries have long pursued a social investment strategy. Their ‘activating’ labour market and family policies have increasingly been used as models to stimulate welfare reforms in continental Europe (Ostner and Schmitt 2008). Over the past two decades, all conservative Western European welfare states have weakened their familialism by expanding childcare provision and modifying their work–family reconciliation policies. Some of these countries took more ‘path-shifting’ or paradigmatic steps (e.g., Germany), while others are considered ‘slow movers’, and have adjusted their policies only incrementally (Morgan 2012; Moss et al. 2020; Palier 2010). So far, neither of these moves has transformed the conservative Western welfare states into work–family and equality-oriented social investment welfare states. Similar developments can be observed in Eastern European countries. The reforms these countries have implemented have increased the diversity of family policies across welfare states, and of work-care options for parents within welfare states.

Gender, family, and welfare state researchers have provided ambivalent assessments of efforts by conservative familialistic welfare states to move in the direction of social investment welfare states. While most praise the shift towards facilitating work–family reconciliation, they tend to criticise these states for neglecting equality issues at the expense of increasing employment (Jenson 2009). The focus on employment can devalue care within the family, and lead to gender inequality in care (Saraceno 2015). While childcare options have been extended, the family – which mostly means the woman in the family – still provides large and essential parts of care that cannot be fully outsourced or monetarised. With the exception of the Nordic countries, social investment welfare states do not sufficiently address this issue or the role of men in care giving. Thus, these states are forgoing the opportunity to actively transform the family into a gender-egalitarian institution, or to sufficiently tackle the new social risk of a care deficit under tightened employment requirements (Saraceno 2015).

Some gender researchers have also pointed out that the pressure to remain employed has expanded the institutionalised, private, or informal market for care and domestic work (Estévez-Abe and Hobson 2015; Hobson et al. 2018; Williams 2012). Much of this care is provided by migrant women who either live in the respective countries or work transnationally (e.g., Anderson 2012). Social investment policies do not sufficiently address the gender and ethnic inequalities that may result from the employment-focused turn in welfare policies.

Researchers have also pointed out the ‘Matthew effect’ of the social investment strategies. Well-educated couples and middle- and upper-income families profit more from social investment policies than families from the lower classes, particularly if the extension of childcare and support for domestic help is accompanied by an extension of (high-quality) market-based or private services (Hobson et al. 2018; Pavolini and van Lancker 2018). This effect might also apply to active labour market policies in conservative welfare states, even though they are intended to integrate disadvantaged groups into the labour market (Bonoli and Liechti 2018). As well as reinforcing the ethnic and gender dualisation in education, labour force participation, employment, social mobility, and social protection that are characteristic of conservative welfare states (Emmenegger et al. 2012), these developments may create new dualisations in family formation. Recent research on childlessness in the Nordic countries, which are the most advanced social investment welfare states, has revealed that there are new and growing cleavages in childlessness and family formation, with people with low levels of education becoming less likely to have (long-lasting) partnerships or children (Jalovaara et al. 2019). Social inequalities in family life and family support have also increased through the development of ethnic, national and transnational, care markets (Hobson et al. 2018; Williams 2012).

Another issue concerns growing incongruences among policies that may affect families at risk in particular. The receipt of social benefits may be tied to participation in active labour market policies, irrespective of people’s care obligations or whether childcare or other measures to facilitate education–care reconciliation are available. The pressure to be in life-long employment may have repercussions for family formation and family behaviour, since employment interruptions, even when taken for purposes of parental leave or care leave, may reduce social security benefit levels in old age. This issue may particularly affect individuals and families with low income and few options to increase their lifetime earnings. With their focus on promoting employment, skills advancement, and higher education, social investment strategies – but also nationally centred welfare, social, and family policies – may fail to provide protection against the ‘new social risks’ that families and individuals face.

The turn towards social investment welfare states calls for a broadening of research on the welfare state, family policies, family behaviour, and family outcomes. There is still relatively little research on how the shift towards social investment welfare states affects family behaviour (Busemeyer et al. 2018). The bulk of the existing research on social investment welfare states has focused on theories, ideas, approaches, and practices of macro-level issues (see, e.g., Busemeyer et al. 2018; Esping-Andersen et al. 2002; Hemerijck 2017; Morel et al. 2012). Studying the consequences of social investment-oriented policies for families is a large research area that covers single-country studies as well as comparative and especially transnational research. Investigating the consequences for families of the shift towards social investment may present specific challenges for researchers. First, the focus on the classic family policies, such as childcare and parental leave, needs to be expanded to include labour market and educational policies, and to studying how these policies affect family behaviour and family outcomes. This issue is tied to a stronger methodological recognition of ‘institutional complementarities’. Second, researchers need to consider incremental changes or changes in policy instruments and conditions. This also means examining whether the shift towards social investment creates incongruences among policies, and how such incompatibilities affect family formation or family outcomes in general, across classes, and across different family life courses. Third, researchers should pay specific attention to ‘new social risk’ families and to the policies that are directed at them. Given the shift away from providing passive social

assistance and towards implementing activating social investment policies (see Bradshaw and Nieuwenhuis in this volume), researchers will need to overcome the boundaries between family research that focuses on poverty, and family research that focuses on welfare states and family policies. Fourth, this trend will mean that transnational studies will be needed that examine how welfare and family policies affect the family behaviour and family outcomes of those who migrate or move between welfare states (see also Andersson in this volume).

5.3 Welfare State, Crises, and the Family

The recent global Great Recession that started in 2007 has spurred research on the link between economic crises and family behaviour (Comolli et al. 2021; Goldstein et al. 2013; Kreyenfeld et al. 2012; Sobotka et al. 2011). A general finding of these studies is that economic uncertainty brought about by an economic crisis or by individual unemployment tends to negatively affect fertility, union formation, and union stability. This effect may vary across recession periods, countries, age groups, and social and educational strata (ibid.). The effects of crises on family behaviour are usually attributed to economic factors, and, in particular, to the decline in or loss of income. Researchers maintain that the impact of a crisis on family behaviour may vary across welfare regimes (e.g., Sobotka et al. 2011). Studies that investigate the links between welfare regimes, family policies, and family behaviour during a crisis are still rare; and those that exist seem to corroborate these assumptions. For example, Kreyenfeld and Andersson (2014) found that unemployment reduces a man's propensity to become a father more in Germany than in Denmark. They attributed this difference to the male-breadwinning focus of the German welfare state and the dual-earner focus of the Danish welfare state. The gap in the fertility developments after the economic crisis of the 1990s in Sweden and Finland is an example of how different family policies may lead to different family behaviours during an economic crisis.

Recent research findings suggest that to ensure that analyses of effects of crises on families are adequate, the welfare state and family policy framework should be extended to include labour market restructuring, crisis management, and welfare state reactions during and after a crisis. All economic crises affect the labour market and the welfare state. The Covid-19 pandemic that hit Europe in the spring of 2020 has demonstrated that this is also the case for health crises. Seltzer (2019) showed that it is not a crisis as such, but rather the labour market restructurings caused by the crisis that tend to affect family behaviour. Comolli et al. (2021) argued that in addition to labour market restructuring, welfare state reactions to the crisis may have shaped family behaviour. For example, whether social security, parental leave, and family or other benefits are cut, maintained, or increased during a crisis may result in different family behaviours and different family outcomes. Similarly, whether social investment policies, such as active labour market policies, skills training, or educational opportunities are expanded during and after a crisis – or whether the crisis management consists primarily of passive transfers to those who lost their employment or slid into poverty – may have different effects on family behaviour. Ólafsson et al. (2019) provided lucid examples of how governmental reactions to the Great Recession mattered for curbing the vulnerability of risk groups and families during and after the crisis. Thus, family research that considers the welfare state and family policy context, as well as how welfare states, labour markets, and firms react to a crisis, may provide deeper insight into the links between crises and their effects on families in general, and by region, composition, socio-economic capacity, than the more common,

income-focused research approaches. The use of such comprehensive approaches seems necessary to understand the impact of the current Covid-19 pandemic on families in different European countries, and to learn from this crisis in order to prepare for future crises. Without accounting for the wide variety of regulations and policies implemented to tackle the health and economic consequences of the pandemic, researchers might miss essential aspects that shape family behaviour and family outcomes during and after the crisis.

6. CONCLUSION

The development of research on welfare states, family policies, family behaviour, and family outcomes has provided rich insights into how institutional configurations and conditions shape families. This review has touched on only a small subset of this research. The new challenges to and the restructuring of welfare states require researchers to both review the theoretical foundations on which the concepts of welfare regimes are built, and to investigate empirically how the shifts in welfare states away from providing protection in case of de-commodification and towards mobilising employment capacities are affecting families. This will require researchers to pay attention to how class, gender, ethnic, and transnational issues are intertwined in providing welfare. Class has become more relevant due to the different levels of integration of families with migration backgrounds across welfare states. Moreover, our understanding of gender is shifting as women and men take on new roles and experience new demands. Ethnic issues have become more complex due to recent waves of immigration, and the transnational aspects of families have become increasingly important through the emergence of new care regimes in Europe. With its differentiating perspectives on individuals, their relationships, and their social and economic standing, family research is well placed to investigate the effects the new developments in welfare states and family policies may have on European societies. Family sociology's individual-level focus and strengths in performing life course analyses and social and gender stratification can bring a missing but crucial dimension to the welfare state and family policy research field, and to the political and scientific discourse on the direction and effects of European welfare states.

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3. Cross-cultural perspectives in family research

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1. INTRODUCTION: CONCEPTUAL ISSUES IN THE CROSS-CULTURAL ANALYSIS OF FAMILIES

1.1 Xenological Approaches

Cross-cultural analyses have found their way into family-related sciences through various paths. Indeed, most of the pioneering work on the family applied a cross-cultural perspective when describing different family types over time and space (e.g., Durkheim 1978 [1888]; Le Play 1883; Morgan 1988 [1877]; Westermarck 1922 [1891]). However, in most of this research, the concept of ‘culture’ was and still is used in a xenological framework in which family-related phenomena are described and explained in relation to ‘other’ ethnic groups and their cultural ‘differences’. Thus, ‘culture’ is routinely used as an explanatory factor if family behaviour is perceived as strange, unusual, or even exotic; whereas such arguments are seldom made if it is assumed that the behaviour can be placed in the context of everyday experiences. This usage dominates not just public debates, but scientific discourses, organisations, and journals. For example, while the 50th anniversary special issue of the *Journal of Comparative Family Studies* (Martin 2019) contains articles on cohabitation in Chile, parenting decisions in South Korea, and marital quality in China, similar papers on families from countries such as the United States or England would be considered misplaced. Even more astonishing is that not a single paper providing a cross-cultural comparison was published in this issue of the journal, which claims on its homepage to publish ‘high quality articles on research in comparative and cross cultural family studies’. Thus, studying ‘non-Western’ families is considered to be per se a contribution to cross-cultural comparisons (Lee 1987, p. 60), even if the comparative perspective is, at best, only implicit. While references to such ‘different’ family and kinship systems may generate some insights in the public and scientific discourse when the aim is to demonstrate how context-specific various theoretical premises and empirical regularities are, they do not represent explicit contributions to cross-cultural comparative family research.

1.2 Cross-National, Cross-Societal, and Cross-Cultural Family Research

Substantial cross-cultural comparative family research implies the analysis of two or more family cultures for one of the two following purposes (Lee and Haas 1993, p. 117). The first purpose is to *establish the generality of theories, hypotheses, or empirical generalisations that are already well established for one culture*. For example, since the work of Blood and Wolfe (1960), various studies conducted in North America and Europe have found that economic resources have a large impact on marital power. However, when cross-cultural studies took the cultural context of gender ideologies into account, they concluded that this relationship holds only for countries in a transitional phase in which they are moving away from traditional gender norms and towards egalitarian gender roles (Rodman 1967). Based on empirical evi-

dence from numerous time series from Europe and North America, it has been taken for granted for decades that when societies industrialise, their divorce rates rise. However, Goode (1993) and others demonstrated that in Arabia and in East Asian countries such as Japan, Taiwan, and Malaysia, divorce rates decreased during this transition from relatively high levels in the pre-industrial period. The second purpose is to *analyse variations in overarching cultural patterns in the institutionalisation of family and kinship systems and individual behaviour in families*. For example, it is assumed that whether a society's predominant economic activities are hunting and gathering on the one hand or agriculture and pastoral farming on the other has a direct impact not only on the society's kinship system, spouse selection, inheritance regulations, and gendered division of labour (Harris 1987, see also Ehmer in this volume), but on the value it places on children and on its fertility strategies (Nauck 2014a). In hunter-gatherer societies, levels of spousal cooperation on child care are high while levels of polygamy and fertility are low, in part because women strive to have long intervals between births in order to avoid having to carry more than one child at a time, and to extend their economic activities (Hewlett 1992). By contrast, in agricultural families, polygamy is more common, the gendered division of labour is more prevalent, and fertility is higher, in part because the children can extend and contribute early to the family economy (Nauck and Klaus 2008).

However, given these purposes of cross-cultural family research, the specifics of cross-cultural approaches must be compared with other types of comparative research. Lee and Haas (1993, p. 118) characterised 'cross-cultural' research as the analysis of 'interrelations among systemic properties of nonindustrial societies'; and thus follow the traditional division of labour between ethnological and sociological research, which in their view concentrates on 'modern', 'industrial' societies. However, such distinctions have become increasingly obsolete since social research has been broadly applied to *all* human societies; and given that recent comparative research has forcefully demonstrated the enormous cultural variability of families, even among societies with the same levels of industrial development and functional differentiation, such as between families in East Asian countries on the one hand and families in North America and Europe on the other (Furstenberg 2013; Raymo et al. 2015; Yeung et al. 2018). Cross-cultural comparisons of these families are theoretically challenging, as they have to overcome the predominant developmental paradigm (Thornton 2005). This paradigm has dominated theoretical reasoning since it began as Social Darwinism in the nineteenth century and evolved into modernisation theory in the twentieth century, because cultural differences can no longer be attributed to differences in economic development or levels of modernisation alone.

The common current understanding is to (gradually) differentiate between 'cross-national', 'cross-societal', and 'cross-cultural' research. This differentiation can be traced back to the pioneering work of Rokkan (1970), Lee (1982), and Kohn (1987). The most general term is 'cross-national family research', which refers to research that studies 'the effects of national and sub-national contexts on behaviors and attitudes of individual actors' (Andreß et al. 2019, p. 2); and that may, in principle, include families from any nation across the globe. 'Cross-societal' research concentrates on comparisons of families from nations with identical or rather similar institutional structures; e.g., comparisons of intergenerational relationships or family policies across Europe (Szydlik 2016, see Neyer in this volume), or of family values across East Asia (Iwai and Yasuda 2011; Yasuda et al. 2011). By contrast, 'cross-cultural' comparisons emphasise such differences within the general institutional structure of societies, and the resulting framing of family and kinship relationships. This framing may include expect-

tations about the validity of specific rules, rights, and obligations related to the respective positions in the family and kinship system, and their societal enforcement. These differences may, in turn, result in culture-specific variations in fertility strategies, socialisation practices, the division of labour between spouses, inheritance patterns, or emotional closeness among kinship members.

One consequence of the culture-specific framing of family and kinship is the shared understanding of ‘family’ within cultural groups; e.g., who is considered to be a member and who is not, sometimes culminating in a discussion about whether a beloved pet ‘is family’. In European societies, this question is especially relevant in the case of step-parenthood; e.g., whether a step-parent is a complementary family member, a substitute parent, or just a new personal relationship of a parent (Arránz Becker et al. 2013). This is a matter not only of subjective definitions, but of legal regulations of parental rights and duties. An early contribution on this topic was an analysis of kinship terminologies by Morgan (1998 [1877]), who demonstrated how the degree of social differentiation between kinship members varied systematically between hunter-gatherer societies and horticultural and pastoral societies, and examined their specific forms of cooperation requirements. The analysis showed that whereas the former (and modern ‘Western’) societies clearly distinguished between members of the nuclear family based on generation and gender, the latter did not differentiate between mothers and their sisters and fathers and their brothers. While such analyses provide important insights into the cultural framing of family and kinship structures, cross-cultural analyses require a general conceptual framework within which such differences may be described and explained. This framework may vary in complexity according to the type of analysis being performed. In the following, family is conceptualised as a social group that is purposively long-lasting, has clear membership boundaries, is constituted by positions defined by generation and gender, and produces collective goods exclusively for its members. This definition takes into account that while the boundaries between family and kinship, the collective goods produced, the sizes of the generations, and the gender positions may vary, they are sufficiently clear to distinguish the family from other social groups.

1.3 Cross-Cultural Family Research as a Multi-Level Problem

As is already implied in the notion of studying the effects of contexts on behaviours, a multi-level approach is inherent in cross-cultural family research. Explicit multi-level models seek to avoid reducing ‘culture’ to differences in individual attitudes, preferences, and cognitions between societies or ethnic groups. Moreover, these models take into account that cultural settings are also characterised by the shapes of social institutions, such as kinship, marriage, and family; and by the overarching setting of institutions within a society. Accordingly, at a minimum, cross-cultural family research has to consider the following levels. On the *individual level*, the specific cognitive maps, preferences, and probability expectations that define the culture-bound selection mechanisms and the routine solutions for problem solving, and thus ‘frame’ individual action repertoires, must be taken into account. On the *relational level*, the cultural definitions of what is ‘fair’ and meaningful in spousal, intergenerational, and kinship relationships, and how status transitions in the (family) life cycle are normatively regulated, must be considered. On the *institutional level*, it may be assumed that the allocation of responsibilities and tasks to spousal partners, families, and kinship systems – e.g., tasks related to childcare and care for the elderly or mutual insurance against life risks – depends

on the institutional setting in the respective society; i.e., on the extent to which these responsibilities and tasks are performed by institutions outside of the family, and thus also shape the opportunity structures of families.

As an example of this complex interplay, nations vary considerably with regard to the inclusiveness of the population in insurances against the risks of life and the level of their coverage. In China, for example, the inclusiveness of insurance has generally increased, but the level of insurance coverage is extremely low, which has led to financial resources being pooled within the broader kinship system to cover the costs of major emergencies. This arrangement is, in turn, based on high levels of solidarity not only within the nuclear family, but among the entire patrilineal kinship system, which is reinforced by practices such as ancestral worship and filial piety (Hu and Tian 2018; Kim 2016). In Germany, on the other hand, the inclusiveness of insurance is almost total, and the coverage is comparably high. Thus, in Germany, intergenerational and – to an even greater extent – kinship functional solidarity has been reduced to a minimum, while the spousal relationship has traditionally been the primary unit of solidarity.

When this dynamic multi-level perspective is applied in cross-cultural family research, the primary task is to formulate and test bridging hypotheses regarding mechanisms that explain cross-cultural differences as an interplay of variations across these levels. Moreover, the use of this perspective enables scholars to resolve the two-sided explanatory problem of cross-cultural family research. On the one hand, the question of under what contextual conditions specific family relations become institutionalised has to be addressed; while on the other, how these institutional regulations shape the individual behaviour of family members must be explained.

In the following, an institutional perspective on family structures is taken within the multi-level framework in order to examine the effects of institutional regulations on family role expectations and behaviours. As is the case for institutions in general, the family as an institution is comprised of complexes of regulations, which are ‘the permanent solution of a “permanent” problem’ (Berger and Luckmann 1966, p. 74). As such solutions have been proven to be successful in the past, they are legitimised by traditions and customs and enforced by internalisation, social control, and governance. For centuries, both historical family research and comparative analyses have clearly shown the lasting effects of such institutional regulations, which have resulted in significant behavioural differences being observed even under similar economic conditions. One striking example of this influence is the polarisation on the collectivism-individualism dimension (Fischer et al. 2009; Gelfand et al. 2004). A collectivistic orientation and kinship labour organisation emerged in the rice-growing regions of southern China, whereas an individualistic orientation developed in the Chinese north, supposedly because complex cooperation is a prerequisite for growing rice and distributing water, but not for growing crops. These differences are still salient among the urban population of modern China (Talhelm et al. 2014). Another example is that growing crops, using ploughs, and mechanising farming favours patrilineal kinship organisation, male dominance in spousal relationships, dowry payments, strong sex preferences for offspring, and gender differentiation in task allocation; whereas growing and selling vegetables in the marketplace tends to be female dominated, and thus increases the bargaining power of women and makes the payment of a bridewealth more likely (Alesina et al. 2013; Boserup 1970).

The following discussion illustrates how major institutional regulations shape selected dimensions of family relations. Two ideal types of kinship systems were chosen for this purpose, and the cross-cultural comparison looks specifically at differences in their institutionalisation

in East Asian and Western European societies. This comparison was chosen because these two types of societies are roughly at the same level of economic development, but differ in their cultural traditions. As it was solely driven by space limitations, this exemplary approach does not neglect other dimensions of family relations (basically, all of the topics of the research handbook could be analysed in a cross-cultural perspective), nor does it neglect other cultural areas in the world or living arrangements in societies with lower levels of economic prosperity, which represent other challenging avenues for cross-cultural comparisons.

2. MAJOR KINSHIP SYSTEMS AND THEIR CONSEQUENCES FOR FAMILY RELATIONS

2.1 Affinal and Descent Kinship Regimes

One of the most consequential distinctions observed in the institutionalisation of families is whether family solidarity is organised primarily through partnership and marriage (*affinal regime* in the following) or through intergenerational relationships (*descent regime* in the following). Both regimes have far-reaching consequences for marriage rules, household composition, residence and inheritance rules, power relations between spouses and generations, and the (gendered) value placed on children. One of the early observations of cultural anthropologists was that this distinction is not just reflected in kinship terminologies (Morgan 1998 [1877]), as the affinal regime prevails in hunter-gatherer societies and in many modern, industrialised societies, whereas the descent regime prevails in most horticultural and pastoral societies (Harris 1987).

This distinction is also the theoretical basis for the description of a major ‘social-historical divide’ that separates societies that do or do not adhere to the ‘Western European marriage pattern’. This term was coined by Hajnal (1965), who divided societies based on whether they were west or east of the line from Trieste to St Petersburg. He showed that at the end of the nineteenth century, around half of the men and almost half of the women in Western Europe remained unmarried until the age of 30; whereas in Eastern Europe (and in other parts of the world), around half of the men were married at the age of 25 and half of the women were married at the age of 20. The description of this special developmental pathway in Western Europe and its ‘colonial descendants’ such as the United States and Australia was subsequently supported and extended by results from historical family research (Goody 1990; for a comprehensive discussion, see Ehmer in this volume). This specific marriage pattern is usually typologised as being based on consensual marriage at a relatively late age; a high proportion of never-married individuals in the population (Hajnal 1965); and the legally enforced principle of the unity of household and marriage, which excludes extended family forms and results in neolocal family formation. Laslett (1971, 1977) as well as Laslett and Wall (1972) and Mitterauer and Kagan (1982) showed that households with multiple families did not exceed 5 per cent of all households anywhere in historical Western Europe and Colonial America, whereas in Eastern Europe and East Asia, this proportion was generally more than 25 per cent. This pattern was also characterised by exogamy and smaller age differences between spouses, with the spousal relationship serving as the primary unit of solidarity; lower levels of gender inequality (Szoltysek and Poniat 2018); and an inheritance pattern that generally did not differentiate by gender or parity (Kohli 2005). However, the observation ‘that the West,

until industrialization, had a unique familial pattern of its own' (Laslett 1977, p. 114) was already made in Goode's seminal work on *World Revolution and Family Patterns*:

For the past thousand years, the Western family systems have been very different from those in China, India, Japan, and the Arab countries. There has been no clan system or lineage pattern. There has been no ancestor worship, and individuals rather than families have been held responsible for crimes. Arranged marriages have been common, but youngsters have had a greater voice in the final choice ... Although child marriages did occur, they were never the ideal or the statistically usual ... There was no polygyny or regularized concubinage. The eldest male was not even ideally the leader of the family, though he was of course paid deference. We cannot, then, view non-Western family systems as basically similar to the Western system at some undefined earlier historical phase just before industrialization. (Goode 1963, p. 22)

This affinal regime is indeed in many ways the opposite of the descent regime that is prevalent in most parts of the world. The affinal regime is based on monogamy, exogamy, neolocality (and, thus, nuclear families), bi-linear descent, and kindred. By contrast, the descent regime is based on membership in a kinship group of unilineal descent and the belief in common ancestry and related worship rituals, and may include polygamy or polyandry and endogamous marriages of various kinds. Murdock's ethnographic atlas (1967) listed 164 societies with matrilineal-organised kinship systems and 558 societies with patrilineal-organised kinship systems. In almost all cases, patrilinearity was combined with patrilocal family formation. This was not the case for matrilinearity, which is not just a mirror of patrilinearity. In most matrilineal societies, a woman lived with her brother, who also had the control rights over her children, whereas the biological father of the children played only a minor temporal role.

2.2 Consequences of Patrilineal Descent

The type of institutionalised patrilinearity that is most dominant worldwide has some 'inbuilt' features that affect intergenerational and intragenerational relationships. In contrast to the kindreds in bi-linear systems, in which every individual has his or her personal configuration of kinship relations, patrilinearity provides a clear structure of belongingness. All individuals are members of just one lineage, which enables high levels of social control and kinship solidarity. This kinship system is an effective form of insurance against life risks, and can be mobilised as a corporate actor. It also has a clear structure of intergenerational wealth flows, as inheritance takes place between the male members only. It regulates intergenerational obligations, traditionally as service and economic transfers from the younger to the older generation (Caldwell 1982). It also provides clear and highly ritualised rules of inclusion. When a woman in a patrilineal society marries, this is a transaction – in the case of cross-cousin marriages, within or between lineages – that is frequently accompanied by an economic transaction, such as the payment of a bridewealth or dowry, which affects the status of the wife in the receiving lineage, positively in the case of a bridewealth, and negatively in the case of a dowry. The woman is expected to leave her lineage of origin and be permanently absorbed into the lineage of her husband, even in case of widowhood; and her children belong to the husband's lineage in case of divorce.

These inbuilt features of the two regimes that were already institutionalised in pre-industrial times provide an important backdrop for understanding how these regimes changed in the last century. From its beginnings, cross-cultural family sociology was accompanied (and in

many cases dominated) by the theoretical question of whether the functional differentiation of modern societies, the mobility demands of the labour market, and the impact of increased affluence on individual choices will result in a worldwide convergence of family structures; or whether the differences in the antecedent societies will result in path-dependent developments. The challenging research question that then arises is whether societies that have similar levels of economic development but institutionalised differences in their family and kinship systems will develop similar family structures, or will continue to display path-dependent features.

3. MAJOR APPROACHES TO FAMILY CHANGE

3.1 Modernisation Theory

The first major (and still most influential) approach was developed by Goode (1963), who argued that urbanisation and industrialisation are the main forces of family change:

Even traditional family systems in such widely separate and diverse societies as Papua, Manus, China, and Yugoslavia are reported to be changing as a result of these forces, although at different rates and speed. The alteration seems to be in the direction of some type of conjugal family pattern – that is, toward fewer kinship ties with distant relatives and a greater emphasis on the ‘nuclear’ family unit of couple and children ... If it is true that the rough outlines of a conjugal system are beginning to emerge in such disparate cultures as China and the Arab world, we are witnessing a remarkable phenomenon: The development of similar family behavior and values among much of the world’s population. (Goode 1963, p. 1)

In this regard, Goode followed contemporary modernisation theories (Inkeles and Smith 1974; Lerner 1958) with their unquestioned assumption that ‘less developed’ societies will follow the ‘developed’ societies along the same path. Thus, it was posited, in societies where the marriage age is low, while the level of parental influence on partner choice and the age differences between spouses are high, industrialisation and urbanisation will result in reduced levels of parental influence and fewer arranged marriages, increases in the marriage age, and decreases in the age differences between spouses. In his review half a century later, Cherlin (2012) stated that Goode ‘took the 1950s Western family as the end point of social change. Just as most sociologists at the time considered Western-style industrialization as the high-water mark of social organization, so too did they consider the Western-style breadwinner-homemaker marriage the high-water mark of family organization’ (Cherlin 2012, p. 584).

In fact, about 95 per cent of men and women in the U.S. were married, and they did so at historically young ages: at a median of about 23 years for men and 21 for women. Women who were in their twenties during the 1950s had about three children, on average. Divorce rates, which had been rising slowly since the Civil War, were flat. Marriage was more dominant as an institution than at any time before or afterward in the twentieth century. (Cherlin 2012, p. 579)

Thus, while Goode assumed from his perspective in the 1960s that the increasing functional differentiation of modern societies would result in a de-differentiation of family structures, the subsequent developments clearly showed an increasing pluralisation of family structures as part of the individualisation of living arrangements and life course trajectories, and of the deinstitutionalisation of marriage (Cherlin 2004).

3.2 Second Demographic Transition

The second approach was developed in the context of efforts to describe a 'second demographic transition' (SDT) (Lesthaeghe 2010; Lesthaeghe and Surkyn 2008; van de Kaa 1987). With regard to changes in the reproduction in families, this approach emphasises that there are different fertility motivations in the 'first' and the 'second' demographic transitions. The first transition is driven by the changes in the benefits associated with having children, and the increased investment costs of children; i.e., by the changing value of children. The first demographic transition thus describes a shift from children having an instrumental utility (additional income for the family group and insurance against life risks; early economic productivity and wealth flows from children to parents, especially in lineage-based subsistence economies), with strong incentives for high parities; to children having a relational utility (lifelong dialogical interaction, large parental investments in the 'quality' of children, and life-long wealth flows from parents to children) with strong incentives for low parities (Caldwell 1982; Hoffman and Hoffman 1973; Nauck 2007, 2014a). By contrast, the subsequent SDT is assumed to be driven by forces of self-realisation that result in increases in cohabitation, late marriage, more frequent separation and divorce, low fertility, and increases in 'voluntary' childlessness.

Unlike the structuralist view of Goode, which explains the uni-directional worldwide change in the structure of families by citing changes in opportunities and constraints, the SDT approach is based on the assumption that this shift is driven by ideational changes: 'Once the basic material preoccupations, particularly long-term financial security, are satisfied through welfare state provisions, more existential and expressive needs become articulated. These are centered on self-actualization in formulating goals, individual autonomy in choosing means, and recognition by others for their realization' (Lesthaeghe 2010, p. 218). The SDT model further assumes that these ideational changes are based on worldwide diffusion processes, regardless of the structural conditions in the respective countries. The core features of this transition are the recognition of individual autonomy; flexible life course organisation; multiple lifestyles; free partner choice and female autonomy; premarital cohabitation as an acceptable and common living arrangement; and the postponement of marriage and childbearing, which results in sub-replacement fertility, increases in extramarital fertility, and, ultimately, rising childlessness (Lesthaeghe and Surkyn 2008, p. 85). Based on these criteria, Lesthaeghe provided rich empirical evidence that the SDT has 'spread' from Northern and Western Europe and North America not only to the other parts of Europe, but to other regions of the world, such as South America and Asia (Thornton et al. 2008). He also found evidence that the 'postponement of parenthood can be linked to the same value orientations as those associated with the SDT in Europe' (Lesthaeghe 2010, p. 241f.).

3.3 Path Dependency as an Opposite View?

Although the structuralist and the ideationalist approaches have provided different explanations for family changes in the last century, they have both predicted that the differences across countries in the institutionalisation of marriage and family and in related basic cultural traits are about to vanish, and instead foresee a worldwide convergence of patterns. These two approaches have dominated the scientific discussion for decades, and have rarely been challenged by alternative perspectives. One of these perspectives was provided by Kağıtçıbaşı

(2007) as ‘a view from the other side’ (subtitle of the book) of the ‘majority-world’. Her central claim was that most academic theories and descriptions of family change are informed by the culture of ‘individualism’ in Western societies. She therefore proposed an alternative model of family change for collectivistic ‘cultures of relatedness’. Her ‘Model of Family Change’ posits that there will be a fundamental shift away from a family and kinship-based utilitarian system of solidarity and towards a system of close emotional bonds, lifelong relatedness, and psychological support (Kağıtçıbaşı 2005, 2007). With the structural shift away from poverty and towards affluence, Kağıtçıbaşı predicted that a cultural change will take place for the countries with a culture of relatedness from economic to psychological interdependence. These arguments imply that in these societies, marriage rates will remain stably high (but perhaps with delayed timing), divorce rates will remain relatively low, and birth rates may be significantly reduced (down to the one child), but childlessness will not be a choice made ‘voluntarily’. Contrary to modernisation theory and the SDT approach, this model asserts different pathways of family change for ‘cultures of individualism’ and ‘cultures of relatedness’.

4. THE PUZZLE OVER EAST ASIA

An interesting case for testing such assumptions about cultural changes in the institutionalisation of marriage and family is East Asia, as its dominant family patterns are in many ways the opposite of the Western European marriage pattern proposed by Hajnal (1965) and his followers. On the one hand, these countries underwent an extremely rapid social transformation during the second half of the twentieth century, with Japan starting first, followed by South Korea and Taiwan, and, finally, by mainland China. Trends in economic and social indicators show that gross domestic product doubled in Japan between 1970 and 2010, increased almost tenfold in South Korea and Taiwan, and increased almost twentyfold in China. Over the same period, the gross enrolment ratio in tertiary education increased from 18 to 58 per cent in Japan, from 8 to 100 per cent in South Korea, from 8 to 84 per cent in Taiwan, and from 0.1 to 23 per cent in China (Raymo et al. 2015, p. 474). On the other hand, East Asian countries such as China, Taiwan, and South Korea (and to some extent Vietnam and Singapore) have a common culture that is deeply rooted in Confucianism, which has important implications for the organisation of gender and intergenerational relations in kinship and family (Chu et al. 2011; Hu 2017; Hu and Scott 2014; Hu and Tian 2018; Lin and Yi 2013; Raymo et al. 2015; Yeh et al. 2013). In these countries, the kinship system is patrilineal, with related rules of inheritance (Hu 2017); and the dominant marriage pattern is exogamous:

On marriage, a woman was exported to her husband’s lineage; her (temporary) ‘slot’ in the household ceased to exist, and a new (permanent) ‘slot’ was created for an incoming bride. Daughters were effectively lost to their parents when they married. And marriage offered adult women the only legitimate access to support by a household. (Das Gupta 2010, p. 128)

However, this separation of a married woman from her family of origin was only in terms of her instrumental relationships, such as those involving inheritance and financial and work support, whereas her emotional ties to her family of origin would be maintained (Nauck 2010, 2014b). Empirical analyses of historical data indicate that Japan had a similar pre-industrial baseline for social change in family structures (Dribe et al. 2014). In the eighteenth and nineteenth centuries, the mean age at marriage in Japan was 14.7 years for women and 18.6

years for men, and was thus even lower than it was in China at that time. Marriage was nearly universal in Japan, as the proportion of the population who never married was 1.0 per cent for women and 4.6 per cent for men.

All these East Asian societies have the ‘predominance of parent–child relationship over conjugal relationship’ (Atoh et al. 2004, p. 54) in common, which is normatively regulated by the ‘filial piety complex’ (Hashimoto and Ikels 2005; Yeh et al. 2013; Zhang et al. 2014), and accompanied by practices of ancestor worship. Sons are more likely than daughters to co-reside with their parents and to engage in functional exchanges with parents (Hu 2017). The flow of financial aid and help with household chores between the generations is mainly from adult children to their parents: ‘The percentage of intergenerational co-residence in the four societies (China, Japan, South Korea and Taiwan) ranges from 23.5% to 47.4%. While parents with greater need such as widowed parents tend to live with adult children, most co-residence occurs among married sons and their parents – a typical, traditional patriarchal family structure’ (Lin and Yi 2013, p. 311).

Table 3.1 displays core indicators of demographic developments of East Asian countries, such as the mean age at marriage and the proportion of the population who never married or were divorced at an age in their 50s. Thus, the table shows the development of the prevalence and the stability of marriage in these societies. Moreover, the table reports the development of the total fertility rate and the sex ratio (proportion of boys to 100 girls) at birth in East Asian countries. These highly aggregated, comparable demographic measures were selected because they are the only ones available for a longer historical period. Comparable micro-data, such as family and household panel surveys or value and attitude surveys, represent at best a cross-sectional picture. All of the trends in the demographic indicators show linear development. In all four societies, the mean age at marriage of men and women increased throughout the entire observation period, with South Korea (31.5/33.9 years) having the highest and China (24.8/26.9 years) having the lowest marriage age in 2010. The increase in the overall costs of marriage is a major reason for this postponement trend:

As most of these costs are borne by grooms and their family, young men often have to wait longer before saving enough to pay for their marriage, and these ruinous costs exert a heavy burden on young people and their family. They include the wedding ceremony itself, the bride-price – a practice that remains prevalent in rural areas – and last but not least, the purchase of a house or an apartment that is becoming a pre-condition for attracting a potential wife in urban areas. (Lu and Wang 2014, p. 48)

Noticeable differences exist with regard to the share of the population who are married. In Japan, the proportion of the population who were never married at age 50–54 increased from 1.2 to 12.0 per cent for women and from 1.4 to 20.9 per cent for men. A modest increase on a much lower level occurred in South Korea and Taiwan, where the share of men who were married was affected by an external shock in the middle of the twentieth century (flight from the Communist revolution in mainland China), which resulted in an imbalanced marriage market at the beginning of the twenty-first century (Francis 2011), and an *increase* in the share of men who are married in recent decades. In China, marriage has been almost universal at all times, with a stable proportion of 0.3 per cent of women and around 3 per cent of men being never married at age 50–54.

The proportion of the population who are divorced in this age bracket increased in all four countries, especially in the most recent decades, when the percentage of women who are divorced passed the 10 per cent mark in Japan and South Korea, but remained at a low level

Table 3.1 *Changes in marriage and fertility behaviour in China, Taiwan, Japan, and South Korea*

	1950	1960	1970	1980	1990	2000	2010	2015
<i>China</i>								
Mean age at first marriage: women	19.7 ²⁰	20.4 ²⁰	20.6 ¹	22.4 ¹	22.1 ²	23.3 ²	24.7 ²	24.8 ²
Mean age at first marriage: men			25.0 ¹	25.1 ¹	23.8 ²	25.1 ²	26.5 ²	26.9 ²
% never married at age 50–54: women				0.2 ^{2,3}	0.2 ²	0.2 ²	0.3 ²	0.3 ²
% never married at age 50–54: men				3.0 ^{2,3}	3.5 ²	4.1 ²	3.2 ²	2.4 ²
% divorced at age 50–54: women				0.5 ^{2,3}	0.4 ²	0.6 ²	1.8 ²	2.4 ²
% divorced at age 50–54: men				2.0 ^{2,3}	1.5 ²	1.4 ²	2.3 ²	2.8 ²
Total fertility rate	6.1 ²	4.3 ²	5.7 ²	2.7 ²	2.3 ²	1.7 ²	1.6 ²	1.7 ²
Sex ratio at birth	105 ⁴	109 ⁴	106 ⁴	106 ⁴	112 ⁴	119 ⁴	119 ⁴	116 ⁵
<i>Taiwan</i>								
Mean age at first marriage: women	20.1 ⁹	21.2 ⁹	21.7 ⁹	23.8 ²	25.9 ²	27.6 ²	29.2 ⁶	30.0 ²¹
Mean age at first marriage: men				25.3 ²	28.8 ²	30.5 ²	31.8 ⁶	30.2 ²¹
% never married at age 50–54: women	0.6 ²¹	0.7 ²¹	1.2 ²¹	1.0 ²¹	1.0 ²¹	4.5 ²²	8.2 ²²	11.2 ²²
% never married at age 50–54: men	3.1 ²¹	8.7 ²¹	8.2 ²¹	14.1 ²¹	8.4 ²¹	4.7 ²²	6.9 ²²	9.6 ²²
% divorced at age 50–54: women	1.0 ²¹	1.9 ²¹	1.4 ²¹	1.6 ²¹	1.9 ²¹	5.9 ²²	12.7 ²²	14.4 ²²
% divorced at age 50–54: men	1.9 ²¹	5.0 ²¹	2.7 ²¹	3.1 ²¹	2.8 ²¹	6.8 ²²	12.2 ²²	14.7 ²²
Total fertility rate	6.0 ²	5.6 ²	4.0 ²	2.5 ^{2,7}	1.8 ²	1.7 ²	0.9 ²	1.2 ²
Sex ratio at birth	119 ⁸	115 ⁸	113 ⁸	110 ⁸	109 ¹⁵	110 ¹⁵	109 ¹⁵	108 ¹⁵
<i>Japan</i>								
Mean age at first marriage: women	23.0 ¹⁴	24.4 ¹⁴	24.2 ¹⁴	25.2 ¹⁴	25.9 ¹⁴	27.0 ¹⁴	28.8 ¹⁴	29.4 ¹⁴
Mean age at first marriage: men	25.9 ¹⁴	27.2 ¹⁴	26.9 ¹⁴	27.8 ¹⁴	28.4 ¹⁴	28.8 ¹⁴	30.5 ¹⁴	31.1 ¹⁴
% never married at age 50–54: women	1.2 ¹⁴	1.7 ¹⁴	2.7 ¹⁴	4.4 ¹⁴	4.1 ¹⁴	5.3 ¹⁴	8.7 ¹⁴	12.0 ¹⁴
% never married at age 50–54: men	1.4 ¹⁴	1.1 ¹⁴	1.5 ¹⁴	2.1 ¹⁴	4.4 ¹⁴	10.3 ¹⁴	17.8 ¹⁴	20.9 ¹⁴
% divorced at age 50–54: women	2.0 ¹⁴	2.9 ¹⁴	3.8 ¹⁴	4.1 ¹⁴	4.8 ¹⁴	7.4 ¹⁴	9.2 ¹⁴	10.4 ¹⁴
% divorced at age 50–54: men	1.3 ¹⁴	1.5 ¹⁴	1.5 ¹⁴	1.9 ¹⁴	3.3 ¹⁴	5.0 ¹⁴	6.3 ¹⁴	6.7 ¹⁴
Total fertility rate	3.7 ¹⁴	2.0 ¹⁴	2.1 ¹⁴	1.8 ¹⁴	1.5 ¹⁴	1.4 ¹⁴	1.4 ¹⁴	1.5 ¹⁴
Sex ratio at birth	106 ¹⁴	106 ¹⁴	107 ¹⁴	106 ¹⁴	105 ¹⁴	106 ¹⁴	106 ¹⁴	105 ¹⁴
<i>South Korea</i>								
Mean age at first marriage: women	20.5 ^{13,11}	21.5 ¹³	23.3 ²	24.1 ²	24.1 ²	27.1 ²	30.2 ²	31.5 ²
Mean age at first marriage: men	24.6 ^{13,11}	25.5 ¹³	27.2 ²	27.3 ²	28.5 ²	30.3 ²	33.2 ²	33.9 ²
% never married at age 50–54: women	0.2 ^{12,11}	0.1 ¹¹	0.1 ²	0.2 ²	0.4 ²	1.1 ²	2.3 ²	3.7 ²
% never married at age 50–54: men	0.4 ^{12,11}	0.2 ¹¹	0.1 ²	0.3 ²	0.5 ²	1.3 ²	4.1 ²	7.9 ²
% divorced at age 50–54: women	1.4 ^{12,11}	0.8 ¹¹	0.9 ²	0.8 ²	1.3 ²	3.7 ²	9.1 ²	12.1 ²
% divorced at age 50–54: men	1.6 ^{12,11}	0.8 ¹¹	0.6 ²	0.6 ²	1.1 ²	3.8 ²	8.0 ²	9.6 ²
Total fertility rate	5.6 ¹⁶	6.0 ²	4.5 ²	2.7 ²	1.6 ²	1.5 ²	1.2 ²	1.2 ²
Sex ratio at birth	104 ^{17,18}	106 ¹⁷	107 ¹⁷	108 ¹⁷	111 ¹⁷	110 ¹⁷	107 ¹⁹	105 ¹⁰

Note: ¹ Jones and Yeung 2014; ² UNPD 2019; ³ age 50–59; ⁴ Huang 2014; Chen and Zhang 2019; ⁵ National Bureau of Statistics of China 2016; ⁶ Raymo et al. 2015; ⁷ 1981; ⁸ Francis 2011; ⁹ Thornton et al. 1994; ¹⁰ Korean Statistical Information Service 2020; ¹¹ Kwon and Kwon 1975; ¹² 1955; ¹³ Tai-Hwan 2007; ¹⁴ National Institute of Population and Social Security Research 2017; ¹⁵ Department of Household Registration 2020; ¹⁶ 1953; ¹⁷ Chung and Das Gupta 2007; ¹⁸ 1949; ¹⁹ Guilmo 2015; ²⁰ Renmin University School of Sociology and Population Studies 1983; ²¹ Lee 1994; ²² Statistics Department of the Ministry of the Interior 2020

of less than 3 per cent in China. In all four countries, the total fertility rate declined to a level below the replacement rate, with South Korea and Taiwan (with a record low total fertility rate of 0.9) belonging to the group of countries with 'lowest low' fertility.

The decrease in fertility in these countries has been attributed to the increasing costs of raising children in combination with a patrilineal kinship system. Maintaining the supply of at least one male descendant has thus become difficult. However, having a son is seen as important for continuing the lineage, providing assistance and housing for the elderly, and guaranteeing the worship of the ancestors. This pressure is reflected in evidence showing that the risk of divorce is 2.2 times higher for women who had three or more daughters but no son than it is for women who had at least one son (Lu and Wang 2014; Zeng et al. 2002). Thus, 'an increase in the cost of children leads not only to smaller family sizes, but also greater neglect of daughters – and hence rising sex ratios' (Babiarz et al. 2019, p. 325). The results displayed in Table 3.1 show that in recent decades, the sex ratio increased in China and South Korea, remained stable at a high level in Taiwan, and remained at the natural level in Japan. This finding for Japan is consistent with Japanese survey results on gender preference, which show an increasing indifference to gender, but offer no conclusive arguments as to why Japan deviates in this regard from other East Asian countries (Fuse 2013).

Couples who have only female children are more likely to have another child, which increases the imbalances in the sex ratio at birth. Accordingly, girls are more likely than boys to grow up with siblings. The preference for male offspring also results in a marriage squeeze for men, especially for those who have less education and live in rural areas. A study in Taiwan additionally shows that the extent of the imbalance affects payments related to marriage:

71% of marriages involved a dowry, bride price, or both ... the marriage market sex ratio is positively associated with the bride price relative to the dowry. Therefore, when the sex ratio rises, competition among men for scarce women bids up the bride price relative to the dowry. Women rise in value relative to men ... (and) a decrease in the marriage market sex ratio caused dowry payments to increase. (Francis 2011)

Finally, the combination of decreased fertility and a preference for male children results in changes in household composition. According to Chinese family tradition, older parents usually live with only one of their married children (stem family), while the other children move out after marriage and set up their own households (nuclear families). Therefore, the number of stem families is always one, while the number of nuclear families depends to a large extent on the number of children. Counterintuitively, this has led to an *increased* proportion of sons living with their parents. Thus, in China between 1982 and 2010, the proportion of nuclear family households dropped from 67 per cent to 42 per cent, whereas the proportion of stem family households increased from 18 to 23 per cent – even though over the same period the proportion of people aged 65+ who were living with their children declined from 68 to 47 per cent for men and from 74 to 58 per cent for women (Xu et al. 2014, p. 48).

In many ways, the demographic indicators for East Asian countries suggest that, as predicted by the SDT approach, the family systems in these countries are on their way to converge with those in the rest of the economically developed world. Increasingly in East Asia, *marriage* is postponed and follows a phase of *cohabitation*. For example, almost one-third of the couples in the most recent marriage cohort in China cohabited before marriage (Xu et al. 2014; Yu and Xie 2015). *Divorces* have become increasingly common in recent decades, whereas *fertility* rates have dropped far below the replacement level. However, some indica-

tors for East Asia do not suggest that convergence is occurring. Compared with countries that follow the Western European marriage pattern, the marriage age in China is comparatively low, especially for Chinese men, and the share of the Chinese population who marry is comparatively high. Although the total fertility rate has decreased sharply, the proportion of women who are childless has remained at a very low level. Indeed, the association between marriage and parenthood continues to be high in China, as marriage is often immediately followed by the birth of a child, and non-marital births are rare (Ji 2015). Most importantly, the level of intergenerational solidarity in the patrilineal kinship system is high in China, which is reflected not only in the inheritance patterns, but in the much higher proportion of stem family households or patterns adapted to the housing situation in urban centres, the functional exchange of money and labour, and the ongoing preference for male descendants.

In sum, among the key demographic developments observed in East Asian countries are the continuation of near universal marriage (albeit delayed) and parenthood (albeit with reduced parities), with voluntary childlessness remaining rare. Moreover, the core of the patrilineal regime, with all its implications for women in the family system, remains largely untouched. Critics of the SDT approach have pointed out the tensions between rapid economic changes and the limited changes in family expectations and obligations: 'These tensions may contribute to later and less marriage and childbearing by increasing the opportunity costs of marriage for women (especially for women with higher levels of education), decreasing the ability of men to fulfil the provider role (especially for men with lower levels of education)' (Raymo et al. 2015, p. 485). However, what institutional changes will result from these tensions in East Asian marriages and families is a question that has yet to be resolved. Will these societies develop their own path-dependent transformation of family structures, as Kağıtçıbaşı's (2007) model of family change suggests; or will worldwide ideational changes result in a convergence of private lifestyles, as the SDT model assumes (Lesthaeghe 2010)? Alternatively, will the structural constraints of functionally differentiated societies be the major drivers of family change, as modernisation theory (Goode 1963) asserted six decades ago (albeit combined with partially wrong predictions)?

5. CONCLUSIONS

One aim of this chapter was to provide arguments for the use of an explicit multi-level approach in cross-cultural family research, both theoretically and empirically. While significant progress has been made in applying such theoretical models, serious limitations in the availability of adequate data sources still restrict the ability to test cross-level effects in comparative research. For example, because the empirical tests of the various models of family change are based on highly aggregated demographic indicators alone (see Section 4), most of the empirical evidence favours convergence assumptions. But these analyses are, in fact, descriptive, and are not able to test the causal mechanisms underlying cross-cultural differences in family change. Thus, they are methodologically superior to the compilations of qualitative cross-sectional materials in the ethnographic Human Relations Area Files (Murdock 1967). However, the potential of family research to test such mechanisms is expected to change rapidly in the near future, as new and comparable data sources at the micro-level are emerging in many countries.

The predecessors of these new data sources are large-scale, nationally representative cross-sectional micro-datasets that were designed to be internationally comparable, such

as the series of cross-sectional fertility surveys that have existed for decades for many developing countries, like the Demographic and Health Surveys or the World Value Survey series. Analyses based on these data sources have considerably enriched descriptions of cross-cultural similarities and differences in family behaviour, because these sources allowed for socio-structural differentiations to be made. Thus, such analyses were able to go beyond simplistic visions of ‘national cultures’ to explore whether societies with the same socio-structural antecedents, such as similar levels of (female) education or urban contexts, have the same outcomes cross-culturally.

Recently, however, family and household panel studies have been developed that make it possible to follow family members and their relations over time. Since the introduction of the Panel Study of Income Dynamics in the United States in 1968, similar and largely comparable studies have been established in other countries, including in Germany (German Socio-Economic Panel) in 1983 and in the United Kingdom (British Household Panel Survey, UK Household Longitudinal Study) in 1991. More recently, such studies have also been established in East Asian countries, including in South Korea (Korea Labor and Income Panel Study) in 1998, in Taiwan (Panel Study of Family Dynamics) in 1999, in Japan (Japan Household Panel Survey) in 2004, and in China (China Family Panel Studies) in 2010. Several of these studies have already been integrated into a Cross National Equivalent File (Ohio State University 2020), and thus can be used for cross-national comparisons of standardised economic and socio-structural variables (Hoffmeyer-Zlotnik and Warner 2014). However, additional data harmonisation efforts will be needed to exploit the full potential of these panel data sources (Nauck et al. 2017; Nauck and Ren 2018). Moreover, the measurement equivalence of these data sources must be tested (Ciecuch et al. 2019; Matsumoto and van de Vijver 2011), especially when the attitudes, activities, and relationships of family members are taken into account. Comparing family panels will allow researchers to investigate for the first time the full potential of the multi-level approach, which was initially described as essential for any cross-cultural comparison, as it can be used to link individual behavioural change to various levels, from individual cognitive frames, to the relational structure of the family, to the settings of societal institutions. The pursuit of this research programme has the potential to restore the relevance of cross-cultural research to family sociology that it had at its beginnings.

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4. Family diversity in a configurational perspective

Eric D. Widmer

1. INTRODUCTION

This chapter stresses the contributions a configurational approach can make to improving our understanding of family diversity; i.e., the heterogeneity of families in contemporary societies. Until the 1970s, most sociological research, inspired by structural-functionalist theory, defined significant family units as nuclear, and focused on groups composed of two heterosexual parents and their biological offspring living under the same roof (Parsons and Bales 1955). According to this theory, the nuclear family was associated with the breadwinner model, in which a strict division of paid and unpaid labour rendered gender and generational inequalities functional for society (Pfau-Effinger 2004). But, beginning in the 1970s, scholars challenged the assumption that family households function in isolation from their broader kinship networks, and stressed the diversity of exchanges with family members living elsewhere (Adam 1970; Furstenberg 2020). Since then, however, most researchers have continued to identify significant family units by the composition of households: i.e., single- or lone parent families are defined as those in which one parent lives with her child without the other parent present in the household; and stepfamilies are defined as those in which the biological parents of a child do not live together, and the resident parent has a new co-resident partner. Likewise, same-sex families have been defined as those in which two adults of the same sex live together while caring for a co-resident child. The frequency of situations in which children do not live with one of their biological parents, or live with a non-biological parent, has been extensively used as an indicator of family diversity. By contrast, I present in this chapter a configurational approach of family diversity that focuses on the interdependencies of family members in order to map family diversity. First, I describe some key dimensions of the configurational perspective on families. Second, I provide empirical results concerning the configurational diversity of families of individuals in middle adulthood and in later life. I conclude by offering some thoughts on the future of configurational studies on the family.

2. A CONFIGURATIONAL PERSPECTIVE ON FAMILY DIVERSITY

In a series of books and articles published from the 1930s up to the 1990s, sociologist Norbert Elias argued in favour of a perspective that approaches social groups as configurations. A few of the central points of this perspective were later stressed as critical for family research (Widmer 2010). Configurations were defined by Elias as ‘webs of interdependencies formed among human beings and which connects them: that is to say, a structure of mutually oriented and dependent persons’ (Elias 1978, p. 45). Being interdependent means that individuals have

power over each other in the relationship; that is, that the practices or decisions of one family member has important consequences for the others by expanding or limiting their agency. Individuals are interdependent in a family configuration because each one fulfils some of the others' needs for emotional support, financial and practical resources, and social recognition. It may be argued that this focus on needs and resources takes us back to the time where structural-functionalist analysis dominated the field of family research, and made it impossible for researchers to understand any alternative to the nuclear family and its gender order (see Sigle in this volume). This is without considering that even when such configurations were oriented towards fulfilling their members' needs, they are not and never were peaceful cohesive groupings. Their members do not pursue the same overarching goals, and never fully internalise their expected roles in the family group (Demo and Allen 1996; Stacey 1990), as family practices appear to have a life of their own beyond social norms (Morgan 2011). Early family sociology research revealed that due to family conflict, the needs of family members for emotional support and companionship are never fully met (Sprey 1971). Indeed, rather than being seen as cohesive, bounded groups, families can be considered process-oriented networks of interdependencies in which individuals cooperate, but also hinder each other because of the social stress generated by the necessity of sharing existing resources (Widmer 2016). Thus, family configurations have to deal with power issues: i.e., a family's resources in terms of time, money, sociability, or support are scarce, and individual family members both cooperate and compete for these resources. This competition creates family tensions and conflicts, which are often beyond the control of the individual. Thus, the pattern of interdependencies that characterises family configurations is largely unintended by the individual members. In turn, these large configurations of ties shape the cooperation and the conflicts that occur in each dyad that belongs to these configurations, which makes it difficult to understand spousal or parent-child relationships independently.

Although the issue of the functions of families is often regarded by sociological scholarship as gender-biased and outdated, it has an undeniable relevance when such functions refer to individual needs, rather than the contribution of the family to society. The configurational perspective challenges the conventional approach, which defines families by focusing on the household unit. In characterising families, this approach places too much emphasis on family as a cohesive group, and too little on how various individuals create configurations of functional interdependencies beyond household units by their daily practices and interactions. In other words, exclusively using household composition to identify family units and to study family diversity disregards the complexity of family processes and family interdependencies. For instance, in a review of stepfamily research, Cherlin and Furstenberg (1994) reported that empirical research conducted in the United States showed that a majority of children whose parents separated defined their significant family members in full or partial contradiction to household membership. Overall, research on stepfamilies has stressed the variety of relational arrangements that exist both within households and in connection with external family members (Ganong and Coleman 2012). In addition, attempts to capture family diversity by listing a variety of household structures have not been successful, as the combination of criteria associated with living arrangements, especially those involving children, made it impossible to identify a reasonable number of types that are homogeneous in relational terms (Mattessich and Hill 1987). After all, as Burgess and Locke (1945) stressed in their seminal book, family interactions, or interdependencies, matter most in family research. Therefore, rather than using household composition as the decisive criterion when examining family diversity, the configu-

rational perspective focuses its research project on patterns of interdependencies, both positive and negative, that link individuals in families.

Research on family diversity from a configurational perspective starts with the assumption that what makes a family is that the individual members co-construct a feeling of being part of a family ‘we’ or ‘we-ness’ (Castrén and Widmer 2015; Elias 1994; Kellas 2005). Such a ‘we’ is based on the individual members’ feelings of intimacy with other family members, and the mutual commitments they develop over time (e.g., Weeks 2007). There is a growing emphasis in family research on different family configurations that serve as alternatives to the nuclear family, as defined by marriage and household membership (e.g., Budgeon and Roseneil 2004; Widmer 2010; Widmer and Jallinoja 2008). The ways in which these configurations embody the mechanisms of the identification and the inclusion of family members are receiving greater attention. To understand how the process of identifying with a family group unfolds, a series of configurational studies asked focal individuals to identify their significant family members (Widmer et al. 2013). The term ‘family’ was deliberately left undefined in order to elicit each respondent’s personal definition of the family. Each participant was instructed that the term ‘significant’ should be used to refer to the individuals in his/her family who had played a role, either positive or negative, in his/her life during the past year. The respondent was then asked to provide a detailed description of his/her ties with, as well as a sociodemographic profile of, each of these family members.

3. FAMILY *WE-NESS* IN MIDDLE ADULTHOOD

In a study based on a random sample of 300 women aged 30 to 55 who had children and a co-resident partner who was not, in half of the cases, the father of the children, each participant was asked to list all significant family members, and describe her family ties with each of them; i.e., whether the family member was a partner, a biological child, a brother, a sister, etc. (Aeby et al. 2014). Almost all of the respondents included their children (98 per cent) and their current partner (96 per cent) as significant family members. In addition, more than three-quarters (76 per cent) of respondents referred to their mother as a significant family member, and large shares listed their father and their siblings as significant family members. Thus, individuals who were related to the respondent by blood were included first on the list of significant family members, right after the respondent’s (married or unmarried) partner. In-laws were generally mentioned after blood relatives: the mother-in-law was listed as a significant family member by 37 per cent of respondents, and the father-in-law was listed by 22 per cent. In addition to blood and in-law connections, female friends were often listed as family members (29 per cent). Interestingly, 42 per cent of the respondents in a stepfamily household listed their former partner (i.e., the father of the target child) as a significant family member. This variety of definitions of family *we-ness* was encapsulated in a typology of family configurations based on cluster analysis that led to the identification of seven types.

- *Friend configurations* were focused on individuals who were considered by the respondent to be family members even though they were not related to the respondent by blood or by marriage or partnership. On average, such configurations included 2.78 female friends and 0.64 male friends.

- *In-law configurations* were strongly oriented toward the respondent's partner and in-laws. The partner, the mother of the partner, and other in-law relationships were overrepresented in these clusters. In-laws were defined not only by marriage, but as the parents or siblings of the cohabiting partner.
- *Sibling (brother and sister) configurations* included the respondent's siblings and their children and current partners. Kinship configurations included a variety of individuals related by blood and marriage to the respondent, such as her partner, parents, children, uncles, aunts, nieces, nephews, cousins, and grandparents.
- *Beanpole configurations* referred to families in which several generations co-existed, but with only a few family members belonging to each of them (Bengtson et al. 1990). These configurations were focused on blood relatives, and included members of various generations, particularly grandparents from both the mother's and the father's sides. Whereas the *sibling configurations* were horizontally oriented, these arrangements were vertically oriented.
- *Nuclear configurations* were almost exclusively centred on the respondent's partner and children. These configurations corresponded to a definition of the family as a co-residential unit, and were based on a more exclusive than inclusive definition of family *we-ness*.
- In contrast, *post-divorce configurations* were based on a highly inclusive definition of family *we-ness*. These configurations included both the previous partner's and the new partner's relatives: e.g., the new partner's children, the ex-partner's parents, and, in some cases, the new partner's ex-partner or the ex-partner's new partner. In-depth qualitative analysis revealed that the inclusion of these family members resulted from frequent interactions. For instance, the respondent and the ex-partner of the new partner may have been linked because they were meeting regularly to transfer children from one household to the other (Castrén and Widmer 2015).
- *Without partner configurations* were only found in stepfamily households. These respondents did not include their present co-resident partner as a significant family member.

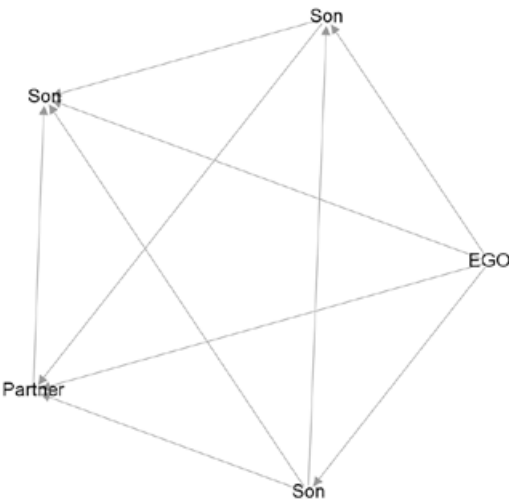
To summarise, identifying the individuals who belong to a family *we*, and the extent to which this *we-ness* is inclusive by going beyond the individuals living in the household (Castrén 2019; Castrén and Widmer 2015), makes it possible to understand family diversity in middle adulthood in reference to individual agency.

4. WE-NESS AND FAMILY INTERDEPENDENCIES

The concept of interdependence, which is central in configurational studies, leads researchers to focus on the relationships or practices through which a person fulfils some important function for another person. The level of dependence describes the degree to which an individual relies on an interaction partner, whereas the mutuality of dependence describes the degree to which two individuals are equally dependent on one another (Rusbult and Van Lange 2003). Indeed, interdependent individuals may not be equally dependent on each other, as the levels and types of constraints each family member can place on another family member's practices depends on the resources and needs of both. While living in the same household constitutes an interdependency, this situation does not capture all financial, practical, or emotional interdependencies that may link individuals to family members. The configurational perspective

posits that families are best defined not as household units, but as configurations of interdependencies among individuals residing in a variety of locations (Schneider and Meil 2008) who benefit from each other's support and assistance.

There are various ways to study interdependencies in configurations. For example, the social network literature offers methodological tools that can be used to operationalise configurations (e.g., Scott 1988; Scott and Carrington 2011). By asking respondents to report the alters who regularly see each other, and who provide each other with financial or practical support, social network methods provide efficient ways to collect a large amount of data on family interdependencies (Widmer et al. 2013). Distinct patterns of family interdependencies stemming from a similar household structure can be extensively researched using the tools of social network analysis (Carrington et al. 2005; Wasserman and Faust 1994). Emotional support is described as the ability to provide guidance and moral comfort. It is usually investigated with questions such as who gives instrumental support to X; meaning which individuals are included in the family *we* when the family faces routine or minor troubles. In cognitive network research (Brands 2013), respondents are frequently asked to evaluate not only their own relationships with their family members, but the relationships among all family members (Widmer et al. 2013). Social network methods further permit the visualisation of exchanges of support that occur in family configurations. Sociograms such as those shown in Figures 4.1 and 4.2 provide a simple and insightful way of representing a large amount of relational information concerning family configurations. In such sociograms, the arrows point to the resource person; that is, the person a family member would ask for support when needed.



Source: Own representation.

Figure 4.1 Emotional support in a nuclear family configuration

Two distinct patterns of interdependencies were identified by previous research on family configurations: namely, one pattern in which bonding social capital predominates, and a second pattern characterised by a large amount of bridging social capital. Bonding social capital refers

to networks with a high density of relationships between members, and in which most, if not all, individuals belonging to the network are connected because they know each other and interact frequently. Due to the collective nature of normative control and social support within such networks, expectations, claims, obligations, and trust among the individual members tend to be high (Coleman 1988). If any network member fails to conform to the expectations of the others, s/he will likely be jointly challenged by several other network members. Bonding social capital is illustrated in Figure 4.1, which features a stepfamily configuration in which almost every member is supportive of every other member.



Source: Own representation.

Figure 4.2 *Perceived emotional support in a post-divorce family configuration*

Bridging social capital is an alternative to bonding social capital based on brokerage opportunities that some individuals develop in networks (Burt 1992; Granovetter 1973). The absence of certain connections creates relational holes in the network that provide some individuals, known as brokers, with opportunities to mediate the flow of information among members, and, therefore, to control and influence others. Figure 4.2 illustrates another stepfamily configuration in which the respondent and her daughter play a brokerage role that connects the current partner and a female friend to the rest of the network members. These individuals take advantage of being intermediaries between other individuals who are otherwise not directly connected to each other in order to develop more autonomy and agency in various contexts (Davidsson and Honig 2003; Szreter and Woolcock 2004).

Interestingly, both this configuration and the other family configurations presented stem from a similar household: each of the two focal individuals reporting on their family interdependencies was living with her biological children and a partner who was not the biological parent of her children. Even though both of these respondents had children and went through processes of separation and repartnering, they developed distinct ways of organising their family interdependencies. The first individual listed as her significant family members her three sons – one from a previous relationship and two from her current relationship – and her partner. Thus, despite her divorce and remarriage, she included in her family only individuals from her current nuclear family, and perceived these family members as having strong interdependencies that led to the development of bonding social capital.

5. FAMILY *WE-NESS* IN LATER YEARS

How does family *we-ness* unfold after retirement? Individuals in this life stage often develop significant relationships with specific family members with whom they do not share a residence. Indeed, scholars have observed that older adults frequently have intimate relationships with, for example, their siblings, their nephews and nieces (Connidis 2010), and their adult children (Bengtson 2001). Having divorced earlier in life may disrupt parent–adult child relationships, and is likely to account for some of the variations in family interdependencies in later years (Shapiro Cooney 2007). Some individuals might disengage from relationships with their children and grandchildren, and compensate for the loss of these relationships by considering emotionally invested friends as belonging to their family realm (van Tilburg and Thomése 2010). These trends suggest that the diversity of family configurations may be as great in later years as it is in previous life stages. This hypothesis was tested in the VLV (Vivre/Leben/Vivere) study, a large, interdisciplinary survey on the living and health conditions of people aged 65 and older in Switzerland (Oris et al. 2016). The respondents in this study were limited to listing a maximum of five significant family members. Overall, 70 per cent of the respondents listed their children, while 46 per cent listed their current partner among their significant family members. A minority of respondents extended their significant family configuration to distant relatives by including cousins. In-laws were also sometimes added to the list of significant family members, with daughters-in-law included by 9 per cent and sons-in-law included by 7 per cent of respondents. Moreover, 21 per cent of respondents listed female friends and 14 per cent of respondents listed male friends as significant family members. Thus, voluntary kin (Braithwaite et al. 2010) – that is, people who are considered family, but are unrelated by either blood or marriage – appear to be present in all age groups. These findings suggest that older people often have significant family relationships that extend well beyond their household or their nuclear family. In order to capture the various logics behind family diversity in a configurational perspective, another typology was constructed that features no less than five configuration types that go beyond the nuclear family (Girardin and Widmer 2015). For example, the respondents in *sibling configurations* listed their siblings as significant family members. In such configurations, sisters were more likely to be included than brothers, while the siblings' partners and children were rarely included. The respondents in *kinship configurations* showed a strong orientation towards having relationships with a variety of kin, such as cousins, nephews or nieces, or non-voluntary kin. This configuration was characterised by relationships with a great diversity of family members, ranging from people related to the respondent by blood or marriage, such as in-laws, cousins, or nephews/nieces; to non-related people, such as stepchildren, godchildren, or close friends. In addition, in a relatively large number of cases, the respondent named no one as a significant family member.

6. THE LIFE COURSE FACTOR

We now turn to the life course as a factor in family diversity from a configurational perspective. The constitution of family *we-ness* depends to a large extent on how individuals have constructed their life trajectories (De Carlo et al. 2014; Widmer 2010). Indeed, family *we-ness* is the result of a long-term cumulative process in which the effects of various decisions con-

cerning marriage, fertility, separation, and divorce – but also migration, health, and career – play out. Widowhood, separation, and divorce are associated with a reorganisation of family interdependencies (Silverstein and Giarrusso 2010). Having gained some autonomy, widowed and divorced people tend to have more extended kin and friends in their networks than married people (Cornwell 2011). Compared with married people, widowed people are more likely not only to develop relationships with siblings and to make new friends, but to receive support from them (Ha 2008). Therefore, the family configurations of widowed and divorced people tend to be more heterogeneous. As divorced men are at particularly high risk of losing significant interdependencies with their children, they sometimes seek to compensate for such losses by investing in other interdependencies, such as with siblings or friends (Campbell et al. 1999). Childless individuals also tend to invest in alternative family interdependencies, such as relationships with siblings or extended kin, or with friends who are seen as family members because they represent an important source of emotional support (Schnettler and Wöhler 2013).

The family configurations of older people are shaped directly by such trends. In the VLV study (Girardin et al. 2018), the respondents in the *nuclear family configuration* were disproportionately male, native born, in good functional health, and higher income; and were more likely to have children and a partner. The respondents in the *sibling family configuration* were disproportionately male, native born, in good functional health, and higher income; and were more likely to have a partner and siblings, but no children. By contrast, the respondents in *kinship and sparse family configurations* tended to be childless and without a partner or siblings; and were disproportionately female, foreign born, in poor functional health, and lower income. Because of gender differences in life expectancy, the older men were more likely to have a partner than the older women, and were thus more likely to be in a *nuclear family configuration*. The study found other marked gender differences as well. For example, men who were single, divorced, or widowed were more likely to be in a *sparse family configuration* than their female counterparts. Divorced men were especially likely to be in such a configuration. It therefore appears that men who had no partner were at particularly high risk of disengagement from different kinds of relatives. Overall, the active creation of family configurations by individuals in later years was bounded by a set of structural factors stemming from their life paths. Gender, income, health status, and, above all, demographic outcomes contributed to the accumulation of advantages and disadvantages over the life course (Dannefer 1987), and these processes, in turn, resulted in a variety of family configurations.

Thus, it appears that the composition of family configurations is the end result of a large number of decisions people make across the life course: e.g., getting married, having children, and getting divorced. Following the linked lives principle (Elder 1994), family diversity is also affected by the decisions made by other family members: e.g., whether a person has siblings or grandchildren depends on decisions made by his/her parents and children. As each person's life course is shaped by interactions within families (Blossfeld and Drobnič 2002), family configurations are beyond the direct grasp of any individual. It should, however, be emphasised that family configurations are more than just the product of a set of past decisions. Family *we-ness* is also relational and symbolic in nature. For example, when a person does not consider individuals related to him/her by co-residence, blood, or marriage as family, s/he is creating a social distance from them that has a variety of consequences. This person is likely to have fewer trusting relationships s/he can turn to for help or for regular social interactions. By contrast, when a person considers individuals who are unrelated to him/her by co-residence,

blood, or marriage as family, s/he is developing a set of functional interdependencies that go well beyond those expected in friendship.

Family configurations are generated by agentic individuals who face constraints related to their life course. As the life course has pluralised, life trajectories have become increasingly heterogeneous in cohorts born after the 1960s (Brückner and Mayer 2004; Demo et al. 2000; Elzinga and Liefbroer 2007). Accordingly, individuals are confronted with new constraints and new opportunities when building up their family configurations. In some cases, even people with highly complex family trajectories develop a small, closely knit, and bounded family configuration that resembles a nuclear family. By contrast, other people develop open family configurations by including friends, in-laws, or remote blood kin in their pool of significant family members. There is still much to be learned about the connections between the characteristics of life trajectories and the development of family configurations. Migration and health trajectories, as well as work trajectories, may have important effects on family configurations that are not yet well understood. Previous configurational analyses have focused on the impact of family events and family transitions on family configurations, and have underemphasised the impact of spill-over effects across life domains (Spini et al. 2017).

7. FAMILY DIVERSITY AND AMBIVALENCE

Differences in the social capital produced by families is only one reason why families are diverse. Debates about the sources of family diversity in the field of social gerontology have centred on the role of intergenerational solidarity and conflict within the family realm, with scholars ultimately reaching a consensus regarding the dialectical rather than the oppositional nature of family dynamics that emphasises contradictions within families, their unexpected consequences, and the need for change (Lüscher 2002). When family members lack the necessary resources to live up to expectations that they will provide each other with support, and remain in close proximity, various ambivalences may be triggered (Connidis and McMullin, 2002). In configurational terms, ambivalence has been defined as the co-presence in a single family configuration of positive and negative interdependencies that could create relational imbalances (Girardin et al. 2018; Widmer and Lüscher 2011). Thus, the focus of configurational research is not only on how social inequalities create stress in families, but on how the organisation of family ties beyond the household can put pressure on family members (Connidis and Barnett 2018).

Various studies have shown that when brothers and sisters need to cooperate to provide care for their older parents, there is often a high level of ambivalence between the adult children and their elderly parents, as well as between the siblings. The composition of family configurations seems to play a key role in the development of ambivalence in families. The family configurations of older adults that are focused on their children, their partner's children, their children's partners, and their children's children tend to be characterised by high levels of ambivalence (Ward 2008), especially when the family members lack financial resources or are in poor health. In such cases, the scarcity of resources can make it difficult for older parents and their adult children to meet their obligations to support each other (Offer 2012). Family configurations are more likely to be characterised by supportive relationships and low levels of conflict when the members have sufficient resources – such as good health, higher income levels, and solid partnerships – to sustain supportive exchanges and to share care responsibil-

ities within the family network (Girardin et al., 2018). Conversely, in family configurations in which children are absent, and those included in the family network participate voluntarily, levels of conflict tend to be low (Campbell et al. 1999; Schnettler and Wöhler 2013). In such family configurations, older adults are better able to maintain satisfying and supportive interdependencies, while disengaging from tense relationships. However, the family interdependencies of childless older adults can also be weak or non-existent because they are not sustained by strong obligations to provide support. Overall, the positive interdependencies within family configurations are often accompanied by tensions or conflicts when resources are lacking and the functional health of the elderly family members is poor. These patterns differ between men and women. Women are more likely than men to experience ambivalence because they are at greater risk of experiencing declines in income and in functional health, and are under much stronger normative pressure to perform family work (Connidis and Barnett 2018).

8. CONCLUSION

In order to better capture family diversity, sociology should go beyond systems of classification based on household composition, such as whether a family is a nuclear family, a stepfamily, a lone-parent family, or a same-sex family. Those classifications reinforce the importance of the nuclear family model by using it as an implicit reference, and by disregarding the relational diversity that exists within each of these household structures. Rather than using the household and its composition as a yardstick to operationalise a family unit, scholars should pay attention to configurations of family interdependencies that individuals actively help to create and sustain over the life course (Zartler and Grillenberger 2017). From young adulthood to old age, a set of configurational types captures various ways of defining family *we-ness* with distinct logics of inclusivity. When family diversity is considered from a configurational perspective, it looks different than it does when the composition of households is the starting point of research. Indeed, two individuals belonging to dissimilar households – one who is married and living with her children and their father, and another who is divorced and living with her children and a new partner – may be embedded in similar configurations of interdependencies because they define their family *we-ness* in similar ways. Alternatively, two individuals can live in similar households but develop very different definitions of family *we-ness* and configurations of interdependencies based on their past life course decisions and the symbolic meaning that they associate with ‘family’. Overall, the reviewed evidence suggests that the diversity of family *we-ness* is based on a few major kinship criteria (Furstenberg 2020): blood; partnership (through marriage or cohabitation); friendship; and the interaction between partnership and blood, as in the case of in-laws or step-relatives.

The configurational perspective provides concepts and tools that add to our understanding of family diversity by going beyond the composition of households. There is much to be learned about the various definitions of family *we-ness* and the logics of the development of family interdependencies (Castrén 2019). The agency of each member is consequential, as it shapes family configurations beyond the confines of households. Greater efforts should be made to understand these configurations, and how personal resources contribute to them, as such findings could shed light on how family clashes (intergenerational ambivalence, couple conflict, and violence), as well as family solidarity, develop. From this perspective, family diversity should be studied based not primarily on differences in household structures, but on

how the interdependencies of family members within and beyond the household are organised (Furstenberg 2020). Specifically, family solidarity and family conflict should be researched in connection with such chains of interdependencies and family identification.

A configurational perspective on families is based on the assumption that family diversity is a product of the actors' agentic actions in response to constraints that an increasingly uncertain world places on them. Indeed, as the social and cultural salience of the nuclear family and its associated breadwinner model weaken, the welfare state erodes, and economic hazards mount, investigating family *we-ness* and chains of family interdependencies is becoming increasingly relevant. Rather than stressing the distinctiveness of particular family structures based on household criteria, sociologists should try to better understand the diversity of family *we-ness*, and the consequences that these different configurations have for the interdependencies that link individuals together in society. By using the large number of tools that social network analysis has to offer (Scott 1988; Scott and Carrington 2011), scholars are well equipped to investigate the diversity of families in contemporary society.

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5. Life course sociology: Key concepts and applications in family sociology

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1. INTRODUCTION

Over the last decades, the life course has become an established framework for studying the dynamics of human behaviour in sociology and adjacent fields of social science. Fuelled by innovative methods and the growing availability of large-scale longitudinal data, research has moved away from cross-sectional and ‘timeless’ investigations, which still characterised sociological research of the 1980s (Elder et al. 2003; Mayer 2009). The concepts and methods of life course research have motivated a wide array of empirical projects in various fields of research, such as social stratification and mobility, education, labour market, regional mobility, migration, and family research. As a result, the life course perspective has become mainstream in sociological research. According to Mayer (2009, p. 414), it has become ‘routine’ and entered a ‘stage of maturity’; whereas Kohli (2007, p. 253) has characterised it as ‘indispensable’ and a ‘broadly accepted and practiced perspective’ for understanding societal change and the structure of societies. Elder et al. (2003, p. 3) even claimed that it has developed into the ‘pre-eminent theoretical orientation in the study of lives’. The adoption of the life course paradigm has significantly reframed how we view family behaviours and structures, and the degree to which these behaviours and structures have remained stable or changed (Elder 1977). It is because of the life course perspective that we now conceptualise family behaviours as dynamic processes that are shaped by institutional contexts.

Life course researchers share an interest in understanding behaviour that is located in time; i.e., ‘between birth and death’ (Mayer 2009, p. 414) and ‘from childhood to old age’ (Elder et al. 2003, p. 4). There is a common terminology in this research: states, transitions, trajectories, and life domains are key terms that structure our thinking along the life course. Furthermore, the use of longitudinal data (qualitative or quantitative) is an essential ingredient of the life course paradigm. Despite these commonalities, different research streams exist. Some scholars seek to further develop the life course into a ‘genuinely interdisciplinary endeavour’ (Bernardi et al. 2019; Levy et al. 2005; Settersten 2003). Others advocate for understanding the life course as an inherently sociological concept that focuses on the interplay of life course behaviour and societal institutions; and, thus, on how historical and socio-political contexts shape life course patterns (Diewald and Mayer 2009; Mayer 2009; Wingens 2020).

In this chapter, we provide an introduction to key concepts and terminology of life course sociology, and explain how the life course perspective is employed in the area of family research. This overview focuses on research that particularly addresses the link between the life course and the social structure; i.e., we will focus on how societal macro-level phenomena and long-term changes in social integration relate to family dynamics. We also draw heavily on quantitative life course research (for an overview on qualitative research, see Bernardi in this volume). We start with a discussion of the evolution of the life course approach in soci-

ology (Section 2). We then introduce the reader to basic terminology, data, and methods that have ‘co-evolved’ with the advancement of the concept (Section 3). In the following section, we address the contribution of life course research to our understanding of societal change (Section 4). In the final section, we conclude with a discussion of the avenues and challenges for the life course paradigm in family sociology.

2. LIFE COURSE ANALYSIS AND SOCIAL STRUCTURE

2.1 Early Research on the Life Course

The notion that the life course is not a random flow of events, but is instead characterised by a clear order of social roles that people enact over their lifetimes, has existed in European cultures for centuries. Since the sixteenth century, the concepts of ‘life stairs’ or ‘steps of ages’ have been used to describe how people progress from birth to old age. Paintings, tapestries, and embroidery have depicted life as a staircase that moves upwards from birth to middle age, and downwards in later life as a person’s health and vigour deteriorate. These life stairs commonly reflected a gendered life course, emphasising the distinct roles women and men inhabit across their lives. These depictions are early evidence that there was a clear perception that people’s lives are structured by age (Ehmer 1996). For age to be assigned such a significant social meaning, a number of preconditions had to be met. First, people had to acquire an understanding of temporal order and time, a dimension that Elias (1982 [1939]; 1988 [1939]) illustrated in his seminal work on the ‘civilizing process’. Second, people also had to have knowledge of their ‘own age’ before they could develop an image of an age structuring of the life course. Ariès (1962 [1960], p. 16) argued that the ‘personal importance of the idea of age’ was accompanied by the official documentation of it. Thus, age structuring must be seen in the context of the registration of marriage, childbirth, and death by parishes; and, later, by state authorities (see also Section 4 on the ‘chronologically standardised modern life course’).

In order to understand the social meaning of age and age structuring, early sociological studies turned to the ethnographical study of rituals (‘rite de passage’), such as engagements, marriages, and burials (Bossard and Boll 1948; Linton 1942). Linton (1942, p. 592) illustrated the significance of status passages by making a fine distinction between the biological process of death and the social rites of a funeral. Thus, it is not necessarily the death, but the ‘funeral rites’ that mark the separation of an individual from a society. Likewise, it is not the birth of a child that marks his/her entry into a community, but the child’s baptism or participation in a similar ceremony or practice that signals the acceptance of a new-born as a member of society. Initiation ceremonies, such as communion, confirmation, and bat/bar mitzvah, mark an individual’s entry into adult status in different cultures and societies. These status passages are social constructs that obtain a meaning only because society attaches privileges and obligations to certain life phases. It therefore appears that life phases and the obligations, duties, and meanings associated with them are not fixed, but are subject to a process of social construction. While this process applies to all life phases, it is probably most pronounced for childhood. As Ariès (1962 [1960]) pointed out, a perception of childhood was absent in medieval times. It was only later that childhood emerged as a separate phase, distinct from adulthood.

The idea of an age-structured life course is also present in early family research. Glick employed the term *family life cycle* to illustrate the different phases of family life:

Typically, a family comes into being when a couple is married. The family gains in size with the birth of each child. As the children leave home for employment or marriage, the size of the family shrinks gradually back to the original two persons. Eventually one and then the other parents die and the family life cycle has come to an end. (1947, p. 164)

Studies of this kind built an important foundation for contemporary research on life course behaviour (Glick 1947; Lansing and Kish 1957). However, the strong normative underpinning of these early studies of family behaviour is rather striking. The recognition that families are not constituted by marriage alone was not present in this definition, even though single parenthood and stepfamilies have existed throughout history. Furthermore, the citation highlights that the author had a clear perception of the temporal order of family events. However, the different phases of the family life cycle appear to be rather static categories that seem strangely detached from the individual life course experience and ‘the processes that might govern development in the life course as a whole’ (Mortimer 2008, p. 217).

2.2 Children of the Great Depression

Glen Elder’s pioneering research in *Children of the Great Depression* (Elder 1974) is a major foundational work of life course sociology. Based on two longitudinal child development studies (the Oakland Growth Study of children born in 1920–21 and the Berkeley Guidance Study of children born in 1928–29), Elder found that the hardships of the Great Depression did not have universal effects on children’s later outcomes. Instead, the analysis showed that how these children fared in later life depended on how old they were during the Great Depression. In many respects, Elder’s work was a rejection of the static ‘age structure models’ (see above). It provided a novel and ground-breaking perspective for at least three reasons.

First, it used data that captured not just a short time span, but more than 30 years (and, eventually, 50 years) of observation, from childhood to middle age. This long time span established the groundwork for studies on the consequences of early life events for later outcomes. Thus, Elder went beyond static age structure models by framing the life course as a dynamic entity in which earlier phases interact with later ones. He elucidated that ‘timing’ and ‘time’ mattered; i.e., that while the age at which a person is subject to certain experiences and social contexts may have an immediate impact, the effects can also unfold over time. Hence, he argued, life has a ‘memory’, and positive and negative events and experiences may pile up over time, leading to *cumulative advantages or disadvantages* in later life (Elder et al. 2007). Elder further posited that some events may be more consequential than others, and they may mark *turning points* in people’s lives (Elder et al. 2003, p. 8). Thus, he observed, there are path dependencies, because certain events and decisions can result in conditions that do not allow people to change tracks easily. Elder also emphasised that life courses never develop in isolation. The concept of *linked lives* highlights the reality that life courses are interlocked with the experiences of other people. This is most evident in family behaviour, as events and statuses of family members – such as a partner having a chronic illness or a child deciding to leave the parental home – have an immediate bearing on the life courses of the other family members. The concept also encompasses the idea that life courses are closely intertwined. For example, within a couple context, individual work and fertility trajectories are mutually related

and interact with each other. Thus, this perspective calls for a dyadic view of behaviour. The linked lives perspective also encompasses the idea that life courses are located in the generational hierarchy, a concept that has inspired a large body of work on the *intergenerational* transmission of family behaviour, such as the transmission of fertility timing (e.g., Morosow and Trappe 2018), cohabitation (e.g., Liefbroer and Elzinga 2012), and divorce and separation (e.g., Engelhardt et al. 2002).

Second, Elder's work motivated a novel type of data collection for sociological research. While psychological studies had drawn on longitudinal data before, these studies often captured a few years only, and focused narrowly on particular themes, such as child development. Elder brought the idea of longitudinal data collection into sociological research. 'Longitudinal' means more than just going beyond cross-sectional work; it involves a holistic approach that aims to cover the entire life course. In this spirit, projects of retrospective and prospective data collection have been initiated. These include large-scale longitudinal quantitative projects, as well as qualitative studies that seek to provide a better understanding of how motivations, feelings, and behaviour are located in time and in the biographical context (see Bernardi in this volume). Classic examples of quantitative life course projects are the British and German cohort studies (Brückner and Mayer 1998; Elliott and Shepherd 2006). Moreover, recent family surveys such as the Generations and Gender Programme and the German family panel touch on Elder's agenda (Gauthier et al. 2018; Huinink et al. 2011).

Third, and equally important, Elder systematically linked life courses and their social and political contexts (Elder et al. 2003). By defining life courses as 'social pathways of human lives' that are embedded in 'historical time and place', he shed light on the interrelation of cohort-specific life courses and changing social structures. This theoretical perspective was further developed by proponents such as Karl Ulrich Mayer, who emphasised the pivotal role of the welfare state in shaping life course patterns (for a more detailed discussion, see Section 4).

2.3 Basic Concepts

At the heart of the life course approach is the concept of time; and, thus, of the duration, spacing, sequencing, and order of events in the lifetimes of individuals (Elder 1975, 1985). In everyday language, the term 'life course' is often used interchangeably with life span. However, *life span* is a concept adopted in psychology for research that examines the psychological development of an individual (Baltes and Schaie 1973). Originally, life span psychology and life course sociology at least partly evolved together. Elder's pioneering work, *Children of the Great Depression*, was based on data collected for psychological studies on child development. Despite their shared terminology and shared origins, the life course approach is now seen as a distinct sociological concept that diverges markedly from life span psychology (Diewald and Mayer 2009). Hence, the choice of terminology is indicative of the disciplinary standpoint. This is also the case for the *life cycle* approach, which featured as a core sociology concept in the work of Glick (1947). Today, life cycle approaches are used primarily in research on intertemporal decision-making in economics (Ando and Modigliani 1963). Apart from their shared commitment to the notion that 'time matters', there are few commonalities between life course sociology and economic life cycle studies.

Events, states, and transitions are key concepts of life course research. An *event* is 'a qualitative change that can be situated in time' (Allison 2014, p. 2). It is important that an event marks a 'sharp disjunction' from what proceeds and what follows (Allison 2014). Classical

examples of a qualitative change are the transition from the *state* of being single to the state of being married, and the transition from being childless to having a child. In addition to representing a sharp disjunction, it must be possible to place the event in time. It is also common to distinguish between *absorbing and recurrent events*. An absorbing event is experienced only once per lifetime. An obvious example is death. A recurring event is an event that can be experienced several times in a lifetime, such as childbirth or marriage. Even though childbirth and marriage are, by nature, recurring events, they can be turned into absorbing events by focusing on the transition of a certain order (e.g., first birth or first marriage). Transitions are embedded in *trajectories*, which are pathways ‘defined by the aging process or by movement across the age structure’ (Elder 1985, p. 31). In sociological life course research, it is also relevant to distinguish between *life domains* or *social spheres*. ‘Domains or life areas such as education, working life, intimate relationships and housing clearly are interconnected, but analytically it is extremely useful to consider them as separate areas for measurement and data organization purposes’ (Giele and Elder 1998, p. 93).

Life course sociology contributes to research on *social stratification* and social inequality by addressing the ‘temporal embeddedness’ of individual lives in social structures. Hence, the sociological study of the life course aims to map, describe, and explain the ‘synchronic and diachronic distribution of individual persons into social positions across the lifetime’ (Mayer 2004, p. 163). Some transitions in the life course are ‘age-standardised’ through legal regulations. For example, legal norms define the minimum age at marriage. Apart from legal prescriptions, the life course is governed by *age and sequencing norms* that define appropriate behaviour. These norms prescribe the right time to move out of the parental home, to have a child, and to get married. They also define the right order of events; i.e., whether it is socially acceptable to have a child before marriage, or to marry before being established in the labour market. Age and sequencing norms vary across time, societies, and population subgroups (Settersten and Hägestad 1996). This is also evident in the case of old age. As a result of increasing longevity and ‘healthy ageing’, the social and cultural representations of ageing have shifted significantly across time (Staudinger 2015). Age norms are usually surveyed by asking respondents to report the ‘best’, ‘proper’, ‘appropriate’, ‘optimal’, or ‘maximum’ age for experiencing a certain event (Marini 1984; Settersten and Mayer 1997; Settersten 2003, p. 88). Empirical research has examined to what extent age and sequencing norms have a grip on family behaviour (Billari and Liefbroer 2007).

3. LIFE COURSE DATA AND METHODS

3.1 Event History Modelling

A guiding principle of the life course perspective is that human behaviour is located in time, and that its analysis requires a dynamic approach. Thus, it comes as no surprise that the ‘life course’ has closely evolved with the emergence of event history techniques in sociology (Elder 1985; Mayer and Tuma 1990). Event history analysis denotes ‘a class of statistical methods for studying the occurrence and timing of events’ (Allison 2014, p. 1). Most of the event history models in family sociology are single-destination state models, i.e., they focus on single outcomes (such as first, second, or third childbirth; first time leaving home; first divorce). However, it may also be appropriate to focus on more than one outcome. For example, an

individual may leave home in order to live alone or to cohabit. Similarly, an individual may exit the family status ‘married’ by moving into the state of being ‘divorced’ or ‘widowed’. *Competing risk models* are event history models for more than one outcome.

Another key feature of event history analysis is that it allows us to study the *timing* and the *spacing* of life course events, and how they relate to key variables of interest. It also provides researchers with the tools they need to study how the timing and the spacing of an event is influenced by *time-constant and time-varying covariates*. Time-varying covariates change their value as a process unfolds. The differentiation between time-constant and time-varying covariates has been vital to progress in family research. For example, the modelling of education as a time-varying trait illustrated that it is not having a higher education *per se* that induces women to postpone childbirth, but rather their participation in the educational system (Blossfeld and Huinink 1991). After they have completed their education, highly educated women often progress more rapidly to having a first child than their less educated counterparts. Likewise, highly educated women may more rapidly progress to a second or third child after they have ‘initiated’ their childbearing biography (Bartus et al. 2013; Kreyenfeld 2002). Numerous dimensions of family behaviour have been explored in this way, such as the relationship between employment and childbearing (Matysiak and Vignoli 2008), the effect of pre-birth cohabitation on union stability (Liefbroer and Dourleijn 2006), the effect of age norms for leaving home (Billari and Liefbroer 2007), the role of networks in family behaviour (Lois and Arránz Becker 2014), and the determinants of the return to the labour market after childbirth (Aisenbrey et al. 2009), to name only a few examples.

Event history modelling greatly advanced family research and established a dynamic perspective on family behaviour. However, like most other statistical techniques, it relies on assumptions that may lead to oversimplification. Event history models are, ultimately, regression models in which the outcome variable is a rate. The drawback of determining a rate is that it conflates ‘timing’ and ‘quantum’; i.e., the lifetime probability of an individual experiencing an event. While this issue is irrelevant for the study of death, as the whole population will eventually experience the event of interest, it is crucial for family behaviour. There is a substantive difference between the timing of first parenthood (age at first birth) and the factors that will eventually lead to lifelong childlessness (probability of ever having children). Although model extensions (‘split population models’) have been proposed to address this shortcoming, these extensions have never diffused into mainstream empirical research. In addition, event history modelling is a ‘piecemeal approach’, as only single transitions are examined: i.e., after the event of interest occurs, the process ends, and the subsequent life course is disregarded. Thus, event history modelling is only a partial response to the initial claim to adopt a holistic perspective on the life course (Elder 1985, p. 31).

3.2 Sequence Analysis

Inspired by the works of Kohli (1985, 1986) and Beck (1992 [1986]), sociologists developed a lively interest in the question of whether life courses were becoming more fragile and ‘individualised’; e.g., whether (male) workers’ ‘normal biographies’ eroded, and how divorce and separation translated into life course disorder in the family domain (Heinz 2003; Settersten 2003, see also Section 4). However, proponents of the approach expressed a certain scepticism that the available methods, such as event history modelling, would be able to adequately map complex processes such as the *de-standardisation of life courses*. Meeting such a challenge

would require taking the ‘trajectory dimension’ seriously (Mayer 1990, p. 13). For a long time, unresolved conceptual and methodological problems caused the analysis of trajectories and sequences – all the more the ‘whole life course’ – to be seen as an unrealistic endeavour (Mayer 1990; Settersten and Mayer 1997).

It was the advancement of sequence analysis and the diffusion of this method into the social sciences that revitalised the original idea of developing a holistic perspective on the life course. Sequence analysis is a technique that originated from studies that had examined the order of the building blocks of DNA (Abbott 1995; Abbott and Forrest 1986). Like DNA sequences, the states that characterise a life course could be modelled as an ordered object. For example, an individual’s trajectory of intimate relationships may be represented as a succession of the states ‘single’, ‘cohabiting’, ‘married’, ‘divorced’, and ‘remarried’. Sequence analysis compares the sequences of different individuals, and creates clusters of individuals with similar life course patterns. Furthermore, sequence analysis is now implemented in software packages that have the power to visualise individual life courses. ‘Sequence index plots’ are appealing techniques for displaying the complexity of the entire life courses of individuals. Sequence analysis has been heavily employed to map and study family diversity, and how it compares across birth cohorts and countries (Aisenbrey and Fasang 2017; Elzinga and Liefbroer 2007; Fasang 2014; Jalovaara and Fasang 2015; Van Winkle 2018; Zimmermann and Konietzka 2018).

While sequence analysis enabled researchers to realise the original ideal of developing a holistic view of the life course, its use also has drawbacks. While event history modelling can deal with censored data of any kind, sequence analysis requires observations of the same or similar length. As a consequence, the data requirements for conducting sequence analysis can be substantial. For example, as panel surveys suffer from attrition, researchers rarely have access to data in which all individuals contributed equally long sequences. Beyond these more technical issues, sequence analysis has so far remained largely an explorative method. Many of the decisions that are made in the process of data analysis are subject to the discretion of the researcher. For example, the researcher can select the states or choose the algorithm that generates clusters. Thus, the results rely on the many decisions that the researcher has to make along the way that could have a substantial impact on the overall results. Despite these shortcomings, sequence analysis has clearly breathed new life into the life course approach, and has advanced the study of family behaviour and family diversity.

4. THE LIFE COURSE AND SOCIAL CHANGE

4.1 Cohorts and Social Change

A key interest of life course sociology is investigating the ‘bond’, ‘interplay’, or ‘intersection’ of personal life and societal change (Elder 1985; Elder et al. 2003; Riley 1987). To elucidate such relationships, researchers had to develop an understanding of the conceptual differences between *age*, *cohort*, and *period*. Many prior sociological studies were prone to conflating cohort and age effects. Cross-sectional data would, for example, reveal that attitudes became more conservative as people got older. However, these data turned out to be only a ‘slice’ through the life courses in the ‘stream of history’ (Ryder 1965, p. 844). Whether an effect was indeed a true ‘age effect’, or was instead due to ‘cohort effects’ – i.e., to older generations

adopting more conservative attitudes – was a question that could only be answered by applying an analytical framework that set age at the centre of sociological inquiry (Riley 1987).

The differentiation between cohort and age effects also drew attention to the *cohort replacement* as a motor for societal change. On the one hand, society provided continuity by socialising new cohort members into roles and positions. On the other hand, the demographic processes of birth and death meant that the society was subject to the constant replacement of its members. While the older generation left their imprints on the new generation, because this imprint was never perfect, the ‘demographic metabolism’ (Ryder 1965, p. 843) opened up the potential for societal change.

Birth in a given historical time and place was also seen as having the potential to unify members of a particular birth cohort, because they were assumed to share ‘formative’ experiences (Ryder 1965, p. 854). Although there were controversies about the terminology,¹ the idea that individual birth cohorts have a unique character was posited by Karl Mannheim as early as the 1920s:

Generation location is based on the existence of biological rhythm in human existence – the factors of life and death, a limited span of life, and aging. Individuals who belong to the same generation, who share the same year of birth, are endowed, to that extent, with a common location in their historical dimension of the social process. (Mannheim 1952, p. 163)

According to Mannheim, members of adjacent birth cohorts may develop a unique culture and identity that is shaped by the conditions at birth and childhood. Sociological studies followed the notion that a ‘generation’ unified people with a ‘distinctive culture and/or a self-conscious identity by virtue of having experienced the same historical events at roughly the same time in their lives’ (Alwin and McCammon 2003, p. 27). Theoretical models such as the theories of ‘value change’ and the ‘second demographic transition’ (Inglehart 1971; Lesthaeghe 1995) have further developed the idea that cohort-specific values shape societal change. In the same vein, it has become standard practice to describe changes in family dynamics along birth cohorts (e.g., Berrington et al. 2015; Billari and Liefbroer 2010).

In Elder’s landmark study, the Great Depression represented a severe *period effect*. Elder showed that the effects that the Great Depression had on children depended on their ages during the economic upheavals. He later examined the repercussions of World War II for family behaviour. In particular, he highlighted that the timing of entry into military service during World War II seriously weakened family stability (Pavalko and Elder 1990). Many subsequent studies capitalised on the idea that period effects may have differential effects on life course patterns. A very influential study in this context is Richard Easterlin’s examination of the significance of *cohort size* for later life outcomes. Easterlin (1987) argued that the members of the exceptionally large cohorts born during the post-war baby boom were subject to fierce competition on the labour market, which, in turn affected their family behaviour; i.e., it resulted in late parenthood and a small family size. Examples of recent studies that looked at how period effects influence life course outcomes are investigations of the impact on family behaviour of the fall of the Berlin Wall or the global financial crisis (Diewald et al. 2006; Jónsson 2018; Kreyenfeld 2003).

4.2 The Welfare State and the Institutionalisation of the Modern Life Course

A seminal application of the life course approach to societal change is Martin Kohli's model of the 'institutionalization of the life course' (Kohli 1985, 1986; Kohli and Meyer 1986). The model provides an ideal-type framework for describing the *modern life course*, including its patterns, structures, and changes, by contrasting the life patterns of Western societies of the late eighteenth and early nineteenth centuries with those of the 'fully modernised societies of the second half of the 20th century' (Kohli 2007, p. 254). In pre-modern societies, lives were subject to unpredictable risks, such as death due to epidemics, wars, and hunger. Life was predetermined by traditional and 'local' institutions and, thus, by the obligations and normative constraints imposed by the family and the community. The process of modernisation, which was unleashed by industrialisation, urbanisation, and the demographic transition, had a fundamental impact on people's lives: as life expectancy rose, lifetimes became more predictable. Increasing social and geographical mobility set individuals 'free from the bonds of status, locality and family of origin'. However, the process of modernisation also led to the emergence of new modes of social control and integration that now 'focused on individuals as the basic units of social life' (Kohli 2007, p. 255). Within the new regime, people were 'processed' through the social structure, primarily based on the criteria of 'chronological age' (Kohli 2007, p. 255). By implementing compulsory schooling and a statutory pension age, the state created the stages of the 'modern life course'. Thus, completion of school and entry into retirement marked the main status passages that created the *tri-partitioning* of life into education – gainful employment – retirement.

The concept of an ordered and standardised life course was clearly developed against the backdrop of the strongly gendered employment trajectories that prevailed in advanced economies in the post-war period. Women's biographies were defined primarily in reference to the family life course (Kohli 1985, pp. 6–8). While the life course concept was geared to the male life course, it nevertheless sharpened the awareness of the risks that women were exposed to. Thus, it became clear that as the welfare state was mainly focused on protecting the 'male breadwinner family' from economic risks, a woman's life course risks were not fully buffered by welfare state regulations, particularly if the woman was unmarried and could not rely on 'derived' rights (for more detail, see Bradshaw and Nieuwenhuis or Neyer in this volume). The model of the 'institutionalised life course' also raised the question of whether the post-war period was exceptional, and whether life course patterns have been gradually eroding since the 1970s (Beck 1992 [1986]; Kohli 1986, p. 294). A large body of longitudinal research was built on the assumptions that disorder was increasing and that working careers were becoming more individualised (e.g., Blossfeld 1986; Rindfuss et al. 1987). Scholars also examined how the 'tri-partitioned' modern life course has been eroding, as the previously sharp divides between work and retirement and work and education are increasingly blurred. Thus, the simultaneity of states has become an important concept in the study of life course patterns.

Numerous studies have also turned their attention to the growing *diversity* and *pluralisation* of the family life course (Billari 2001; Bras et al. 2010; Brückner and Mayer 2005; Konietzka 2010; Zimmermann 2020). These studies have generated important 'stylised facts' of family behaviour in post-modern societies, including that in large parts of the population, marriage and childbirth are being either postponed or forgone; and that as a result of these trends, life course transitions that had been intertwined in the mid-twentieth century have 'de-coupled'. This research showed that moving out of the parental home no longer coincides with marriage

(Andersson and Philipov 2002), and that the ‘normal’ sequence of events of marriage and childbirth no longer holds for the younger cohorts. At the same time, a new phase in the early life course emerged: namely, that of co-residing without marriage. This trend led to studies being published on the timing and duration of cohabitation (e.g., Jalovaara and Kulu 2018). Likewise, divorce and separation were identified as key elements of the deviation from the allegedly ‘normal’ family life course. Research on repartnering, remarriage, and stepfamily behaviour, and on ‘grey divorce’, addressed the resulting family transitions in the middle and later life course (e.g., Brown et al. 2019; Henz and Thomson 2005; Ivanova et al. 2013). Despite these fundamental changes in post-modern life courses, life course patterns are still gendered: compared with men’s life courses, women’s life courses are more likely to be characterised by ‘non-standard’ employment sequences, part-time work, and career interruptions (see Grunow in this volume).

More generally, the life course approach provides a ‘toolkit’ for understanding how the *modern welfare state* structures individual life chances. The state supports and enables life course transitions via social policy regulations, but it also restricts life course options (Mayer and Schoepflin 1989). The welfare state enacts its power in manifold ways: e.g., by setting legal ages for school entrance, marriage, and retirement; or by introducing compulsory military service. Furthermore, state policies often favour certain types of behaviour more than others. For example, marriage grants support particular life course transitions (namely, marriage), while discriminating against others. By focusing on the welfare state, the life course approach has been used to build a bridge to comparative welfare state research; i.e., to examine social policies and their implications for social inequalities from a cross-national perspective (Daly 2020). Several more recent studies have emerged from this logic that have explored processes of social stratification and family dynamics by comparing patterns across countries (Jalovaara and Fasang 2015; Van Winkle 2018; Zimmermann and Konietzka 2018).

5. CONCLUSION

Our aim in this chapter was to provide an introduction to the basic concepts and terminology of life course sociology. We also sought to elucidate how this approach has been employed in quantitative family sociology. The key contribution of life course research to family sociology has been to cast a dynamic perspective on family behaviour. Its most significant achievement is, perhaps, that today it comes naturally to study birth, marriage, leaving home, or divorce as dynamic events in the life course of individuals. Event history modelling has become widely accepted as an appropriate tool for examining the determinants of family behaviour, including how education, employment, unemployment, occupation, household context, family of origin, and family and friendship networks influence transitions in the family domain. In addition, advancements in sequence analysis have enabled researchers to develop a holistic view; e.g., to study heterogeneity, pluralisation, and de-standardisation of family behaviour across the life course. Important data collection projects have been initiated in the spirit of the life course paradigm. The most important of these projects in the European context are the Generations and Gender Survey and the many national surveys that have a strong connection to this, such as the German family panel (pairfam), the ‘Netherlands Kinship Panel Survey’, and the new panel survey ‘Family Research and Demographic Analysis’. Data of this kind make it possible to locate behaviour within both biographical and historical contexts. The availability of these

data calls for the development of a dyadic approach that enables researchers to study how individual life courses are intertwined with each other within intimate relationships and families. Moreover, as these datasets enlarge our understanding of family behaviour in individual European countries and from a cross-national perspective, analyses based on these data can help us better understand how social policy contexts influence life course patterns.

What are the prospects for life course sociology enhancing our understanding of contemporary family patterns in the twenty-first century? As we already alluded to in the introduction, there is controversy about the future avenues of life course research. Some scholars have argued that the life course should be developed further into an interdisciplinary framework (Bernardi et al. 2019; Levy et al. 2005; Settersten 2003). Others have claimed that it would be more beneficial to view the life course as a sociological concept that should be geared to the intersection of the social-political context and processes of social stratification (Diewald and Mayer 2009; Mayer 2009; Wingens 2020). From the latter point of view, the key challenge of life course sociology is to enhance our understanding of ‘the impact of particular state interventions and their consequences on life course decisions’ (Mayer and Schoeflin 1989, p. 203). With its variations in policy contexts, Europe provides an ideal laboratory for such an endeavour (Aisenbrey and Fasang 2017; Jalovaara and Fasang 2015; Neyer and Andersson 2008; Van Winkle 2018; Zimmermann and Konietzka 2018). On the one hand, this type of research has advanced our knowledge of how welfare policy contexts shape family behaviour. On the other hand, the more causal investigations of single policy interventions have been left to economists, who have largely disregarded the life course approach. It should be one of the ambitions of the life course agenda to regain territory in this realm, and to contribute more extensively to research on policy interventions, policy measures, and policy configurations in family behaviour. Another challenge is to adequately map family behaviour in the twenty-first century from a ‘linked lives’ perspective, particularly for couples who have to synchronise their care and employment activities, but also for post-separation families whose individual life course transitions may hinge on the behaviour of their ex-partners. Methodologically, multi-channel modelling has provided a new tool for mapping the interdependences of several trajectories (e.g., Gauthier et al. 2010). Finally, the question of how family events mark turning points in the life courses of individuals remains a highly relevant issue. The re-traditionalisation of family behaviour after first birth could have profound biographical and societal implications (see Grunow in this volume). While it is obvious that traditional care patterns can have long-term implications for women’s subsequent career advancement, more recent research suggests that traditional care patterns also have adverse implications for the life courses of fathers. For example, it has been shown that a father’s post-separation behaviour and his long-term relationship with his children are contingent on his behaviour prior to separation (e.g., Poortman 2018). Studies of this kind not only uphold the original idea of developing holistic life course perspectives; they also emphasise how important it is to view behaviour within a biographical context.

NOTE

1. Ryder (1965, p. 853) insisted that ‘cohort’ was the correct terminology, and that ‘generation’ should only be used for intergenerational relationships.

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PART III

NEW PERSPECTIVES IN FAMILY RESEARCH

6. Digital family research

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1. INTRODUCTION

The interdisciplinary orientation of family research – spanning anthropology, history, psychology, social policy, economics, sociology, and demography – is reflected in the wide range of epistemological perspectives and methodological approaches used in the field. In some research areas, the collection of digital data has a long tradition. For instance, video data are collected to study everyday micro-level interactions in families, and are used as tools in family therapy (Erickson 2011; Reusch and Keys 1956). In other fields, and in quantitative family demography in particular, researchers increasingly employ digital traces that emerge as a by-product of other processes (Cesare et al. 2018). As digitalisation progresses, digital data are rapidly becoming abundant and accessible, and offer new and unique opportunities for conducting social research. At the same time, the quality of random probability surveys is deteriorating. The contact information that is necessary to be included in random probability sampling, for example taken from population registers, tends to be less complete and more selective with regard to the exclusion of specific social groups than it was in the past. Low response rates to telephone surveys further exacerbate the challenges entailed in traditional surveys. In the United States, for example, response rates have stabilised at around 9 per cent since 2012 following years of decline (Keeter et al. 2017). Similar trends have been observed in other countries. While the quality of many surveys is decreasing, the costs associated with conducting surveys remain higher than the costs involved in collecting most digital data (Salganik 2018). Decreasing survey quality should be of great concern to family researchers, and highlights the need to explore and improve both survey methods and other research strategies, including administrative records and digital traces.

This chapter focuses on the opportunities and challenges associated with using different types of digital data in empirical family research. We distinguish between 1) digital traces that are repurposed for family research, including data from Twitter, Facebook, or Google searches; and 2) digital data collection tools developed and used specifically for research purposes, particularly video data analysis and experience sampling. We build on Salganik's (2018, p. 7) distinction between digital traces as 'ready-made' data, and digital data that have been collected for research purposes as 'custom-made' data. In practice, researchers often choose strategies that combine ready-made and custom-made digital data, or employ additional sample selection procedures that 'customise' ready-made digital traces to some degree. While both types of digital data can be used to address a range of research questions, there are a number of challenges associated with collecting and analysing these data.

Here, we will not discuss the question of how digital technologies, such as smartphones or video calls, affect family life, as this issue can be addressed using digital data, conventional survey data, qualitative interviews, ethnographic methods, or other research approaches. Instead, we focus on the opportunities for using these two types of digital data in family research more generally. Rather than attempting to provide a comprehensive review of the

studies on family issues that have used digital data, we will present examples of studies that shed light on the areas in which the application of digital data in family research seems particularly promising.

We begin by introducing ready-made digital trace data (Section 2), and comparing these data to custom-made data purposefully collected with digital technologies (Section 3). We explore the advantages and challenges associated with using each type of data, and present examples of how these data are applied in family research. Moreover, we seek to identify family-related research questions for which the use of ready-made and custom-made digital data appears particularly promising. In Section 4, we close by providing a broader perspective on the opportunities and pitfalls associated with using digital data in family research, including reflections on the ethics of conducting such research.

2. DIGITAL TRACE DATA

Digital traces, or ‘digital footprints’, result from ‘social interaction via digital tools and spaces as well as digital records of other culturally relevant materials, such as archived newspapers and Google searches’ (Manovich 2011). These traces include data from popular social networking sites (such as Facebook or Twitter), personal blogs, and collaborative online spaces (such as Wikipedia), as well as data derived from mobile phone or credit card usage (Cesare et al. 2018). Thus, a defining characteristic of digital traces is that they emerge as by-products of social processes. Hence, digital traces can be seen as ‘ready-made’ datasets that were not gathered primarily for research purposes (Salganik 2018).

The use of digital trace data is at the core of a rapidly emerging field of ‘digital demography’ (Alburez-Gutierrez et al. 2019; Blumenstock 2018; Blumenstock et al. 2018; Cesare et al. 2018). To date, digital demography has mostly focused on analysing international migration flows, including the location tracking of IP addresses when individuals log into their email accounts, Facebook advertisement target populations, geo-located Twitter data, and Google+ data (Zagheni and Weber 2012). Blumenstock et al. (2015, 2018) have called attention to both the possibilities and the caveats that come with using cell phone data to influence and to study global socio-economic development, particularly in poorer regions of the world.

While migration and global development are undoubtedly tightly linked to processes unfolding within family networks, the use of digital trace data to study core topics in family research has been relatively limited. The area of family research in which digital trace data have been used most extensively, and for the longest period of time, appears to be research on online dating (Hitsch et al. 2010). Online dating as a means of mate selection is becoming increasingly accepted and widespread. A large number of studies have used data from online dating websites to draw conclusions about mate selection, and about decision-making more generally (Bruch and Newman 2018; Skopek et al. 2011; Van Bavel in this volume). The findings of online dating studies have substantiated previous research showing that there is considerable educational homogamy in partner selection on online dating platforms, affecting how individuals both contact and respond to prospective matches, albeit in gender-specific ways. It has, for example, been shown that higher-educated men tend to contact lower- as well as higher-educated women, whereas higher-educated women are less likely to contact or reply to lower-educated men (Skopek et al. 2011). In addition, the findings of online dating studies have shed light on different stages of the decision-making processes in mate selection, which

could have more general implications for decision-making behaviour in market situations (Bruch et al. 2016).

Several recent studies have started to explore digital trace data for predicting fertility trends. These studies have, for example, used web searches to show that searches of terms such as ‘abortion’, ‘pregnancy’, or ‘birth’ predict short-term future behaviour, at least on the level of aggregated averages (Ojala et al. 2017; Rampazzo et al. 2018). Ojala et al. (2017) combined digital traces from Google Correlate and Google Trends¹ on fertility with custom-made ‘ground truth data’ from the American Community Survey to show that specific searches vary with socio-economic status in expected ways. In addition, recent studies are beginning to transfer web-scraping methods and natural language-processing techniques that were developed in computer sciences, and are frequently applied in political science to family policies and public discourses around family issues. For example, Gülzau (2018) used topic modelling to link digitalised media coverage of family issues to family policy change, and analysed exchanges in a parenting online forum to study how parents negotiate parenting norms.

Ready-made video data represent another potentially interesting source for family researchers. User-generated content websites are providing an ever expanding pool of visual data (i.e., moving or still images) that are easily accessible for researchers (Nassauer and Legewie 2018). Most of the existing studies that have used these data addressed the impact of online platforms such as YouTube, Instagram, or Facebook on family interactions in combination with custom-made observational and survey methods (e.g., Baker and Carreño 2016; Burroughs 2017; Charoensukmongkol 2018; Fingerman et al. 2016; Jeanfreau et al. 2019; Le Moignan et al. 2017; Raczy et al. 2017). But data from these platforms could be used much more broadly, as they offer direct glimpses into everyday family interactions. While this opportunity is being increasingly recognised in other fields, such as criminology and deviant behaviour research (e.g., Collins 2008; Lindegaard et al. 2018; Nassauer 2016), family researchers who take advantage of ready-made video data remain the exception. For instance, Marcon et al. (2019) studied breastfeeding displays on Instagram, and examined how users share perspectives and information about the topic. Johnson et al. (2019) used YouTube videos to study the lived experiences of parents and families affected by the opioid crisis. Researchers can access platforms such as Facebook and Instagram to study videos and pictures as well as the captions that users assign them, and comments from their social network that the videos and pictures elicit. For instance, such data could be used to study (online) presentations of the self during family formation, or norms of parenting and relationship harmony.

Thus, while researchers have made extensive use of online data to study dating, they have only started to explore opportunities to draw upon online data to study topics such as fertility, family policy, and parenting norms and practices. This reluctance could be attributable to the difficult trade-offs involved in using such data. It may, for example, be hard to interpret the meaning of what is being measured in the digital traces (see below).

2.1 Opportunities

Digital traces have been heralded as a third major data revolution in ‘digital demography’, after the paradigms of ‘census and administrative records’ and ‘theory-driven micro-level data’ (Billari and Zagheni 2017). Using digital trace data has several key advantages over using conventional survey data, especially when seeking to answer specific questions in family research (Mützel 2019; Salganik 2018; see also for an overview Table 6.1).

Table 6.1 *Overview of the possibilities and the challenges associated with using ready-made and custom-made digital data for family research*

	Digital traces: ready-made	Digitally collected: custom-made (smartphone-based experience sampling methods and video-based research)
Potential	<ul style="list-style-type: none">– Big, large <i>N</i>– Always on, real time, often repeated measurements in small intervals– Non-reactive, no social desirability bias towards researchers	<ul style="list-style-type: none">– Data collection of real-time, or close to real-time actions and situations– Detailed study of micro-level processes
Challenges	<ul style="list-style-type: none">– <i>Limited information on the population covered</i>: selective, non-representative, drifting, algorithmically confounded (bots)– <i>Limited information on data-generating process</i>: data dirty or inaccessible, often held by private companies, data incomplete to assess theoretical constructs, indicators available have ambiguous interpretation– <i>Ethically sensitive</i>: lack of informed consent, data often owned by private companies, potential for misuse	<ul style="list-style-type: none">– <i>Limited information on individuals and the context</i>: on their own, neither experience sampling methods nor video data analysis provide detailed information– <i>New skill set requirements for researchers</i>: e.g., building an app and data infrastructure or methods of video data analysis– Information on study subjects and context– <i>Ethically sensitive</i>: lack of informed consent, privacy, potentially disruptive Hawthorne effects
Potential solutions	<ul style="list-style-type: none">– Extensive data cleaning– Check against ground truth data– Combination with other data sources– Post-stratification	<ul style="list-style-type: none">– Further training, methodological development, and interdisciplinary collaboration– Mixed-methods approaches– Careful assessment of research ethics, walled-garden data archiving, diligent pre-study briefing of participants
Applications	<ul style="list-style-type: none">– Online dating– Google searches on fertility– Parenting online forum– Digitalised newspaper coverage of family issues	<ul style="list-style-type: none">– Division of housework– Families as learning environments
Promising areas of future application	<ul style="list-style-type: none">– Small subpopulations that are difficult to reach and/or tend to be under-covered in surveys: male fertility, LGBTIQ^a population– Self-representation, family norms– Family time use, division of labour– Group comparisons rather than representative population estimates	<ul style="list-style-type: none">– Family interactions– Situational dynamics and micro-level processes– Family time use, division of labour– Self-representation, family norms– Resource activation in family networks

Source: Cesare et al. (2018); Mützel (2019); Nassauer and Legewie (2018); Salganik (2018).
Note: ^a Lesbian, Gay, Bisexual, Transsexual, Intersexual, Queer.

First, these datasets are usually *big*. Thus, family researchers using digital trace data are less limited by sample size restrictions; a problem that often arises when researchers attempt to use survey data to study specific subpopulations with small case numbers, such as single fathers, fathers who take parental leave, female breadwinner families, or families with special needs. For example, even when using exceptionally rich survey datasets, such as the German Family Panel pairfam (Huinink et al. 2011), researchers quickly run into sample size limitations due to attrition and selective non-response. But it is also worth noting that some subpopulations are relatively well covered on social media and the internet, while others are not. For example,

members of the LGBTQ community tend to be active on dating websites and in social media, because these relatively anonymous virtual forums allow them to interact more effectively as members of a relatively small and geographically dispersed population. In contrast, young children are not covered very well in social media, except through the eyes of a select group of parents who share content about their children online, despite the known risks of the misuse of such material, particularly if it is visual. The use of digital trace data is particularly promising for quantitative studies of subpopulations who are usually not well covered in surveys, and who are often only analysed using small, qualitative snowball or convenience samples (Fasang et al. 2016). These data can be used to examine regional variation more effectively than has been previously possible by enabling researchers to study local institutional and compositional context effects on small subpopulations. For example, social media data could be employed to map the local concentrations of specific subpopulations more accurately, and to investigate how the local concentrations of these groups affect their interactions and outcomes.

Second, as most digital traces are ‘*always on*’, they can provide real-time repeated measurements in very short intervals (Lazer and Radford 2017; Salganik 2018). Thus, by drawing on these data, researchers can explore the temporal dynamics of behaviour and interactions in much greater detail than is possible using survey data. Moreover, the continuous production of digital traces is ideal for research designs that build on natural experiments with before and after comparisons. As a caveat to these advantages, the population of users covered in the processes that generate digital trace data, and the search and newsfeed algorithms that digital platforms employ (e.g., Google search, Facebook, or Twitter; Lazer et al. 2014), are constantly shifting and changing; a process Salganik (2018) refers to as ‘drifting’ (see below). Therefore, these data are not well suited for detecting changes over time or in an aggregate-level process, as any changes that are found might simply be due to drift in the user population or algorithms that cannot easily be monitored by the researcher. Drifting severely limits the options researchers have for using digital trace data to study social change in family structures at the aggregate level. Nonetheless, family researchers examining micro-level family dynamics may find it interesting to study the temporality of short-term interactions among, for example, different generations on Facebook. It may be assumed that within short time intervals, the population covered in most digital traces remains reasonably stable.

Third, digital traces are ‘*non-reactive*’. This means that because these traces are a by-product of other processes, the possibility that participants adapted their actions in response to being observed is low. The non-reactivity of digital trace data could be particularly appealing for addressing family-related questions, which are often complicated by issues of social desirability bias. Many topics related to family, fertility, and intimate relationships are normatively loaded, such as abortion or extra-marital relationships. However, this potential advantage may not be as clear-cut as it first appears to be. While digital traces are, by definition, not affected by social desirability bias towards the researcher, the self-representation in social media will be heavily guided by social desirability in the general population. For instance, research has shown systematic bias in online dating platforms, with men over-reporting their height and women under-reporting their weight (Toma et al. 2008). Similarly, the representation of family life on social media platforms often polarises into the ‘showing off’ of happy and successful family events, interactions, and achievements on the one hand; and the rejection of unrealistic norms of parenting and relationship harmony through the sharing of stories about the failure to meet these goals by self-help-oriented groups on the other (Gülzau 2018). Hence, digital traces may be more likely to provide information about family norms and how

they are negotiated than to give ‘true’ reports about family behaviour and interactions. For these reasons, it is crucial that family researchers using these data distinguish digital traces that reflect a conscious representation of self from digital traces that indicate ‘true’ behaviour and characteristics (see our discussion of the ambiguity of the social meaning of digital traces below). Researchers may be able to discern actual behaviour through a strategy of ‘partnering with the powerful’ (Salganik 2018); i.e., collaborating with organisations such as non-governmental organisations, companies, and app developers who generate digital traces. For example, anonymised data from family calendar apps such as Cozi, CloudCal, or Looping could be helpful in studying family time use and the gender division of paid and unpaid work. It is well documented that individuals tend to over-report the share of the housework they do, but under-report the share of the housework their partner does. In surveys, partners’ assessments of their own and each other’s contributions to housework often deviate considerably, and the use of different measures leads to different results. Lee and Waite (2005) highlighted this issue by benchmarking survey questions against estimates obtained from an experience sampling study (see below). While actual family behaviour will still deviate from plans fixed in a calendar, these plans tend to be more accurate than individual self-reports, and are more likely to reflect the outcomes of family negotiations on the planned division of tasks. Of course, the need for ethical safeguards and effective anonymisation can make conducting this type of research especially challenging (Salganik 2018, p. 307ff.).

2.2 Challenges

While there is considerable excitement surrounding digital demography, there are many challenges involved in repurposing digital traces for social research in general, and family research specifically. The rather extensive list of potential challenges mentioned in the literature includes issues related to coverage, selectivity, and non-representativeness; lack of information on data-generating processes; and ethical questions regarding the collection of, access to, and analysis of digital trace data (Cesare et al. 2018; Fasang 2018; Legewie and Nassauer 2018; Mützel 2019; Salganik 2018). These potential challenges have been conceptually organised in different ways. We have chosen to group them around three main topics: limited information on the population covered, limited information on the data-generating processes, and ethical sensitivity.

2.2.1 Limited information on the population covered

Most digital trace data completely cover a subset of users of a particular online service. As a result, the sample is often highly selective, and is rarely representative of a general population that family researchers are interested in. These biases create challenges akin to biases in other types of data, such as selective non-response in surveys, or sampling on the dependent variable in qualitative studies (for a discussion of this issue, see, e.g., Lazer and Radford 2017, p. 31). As in the case of survey data, the selectivity and non-representativeness of digital data can be quantified and modelled with appropriate statistical procedures, and countered with post-stratification measures. For example, weighting procedures allow accounting for bias based on known proportions in the population of interest (Salganik 2018). Billari and Zagheni (2017, p. 9) consider social media and the internet as ‘laboratories’ that produce systematically biased estimates of quantities: ‘there are hidden, potentially stochastic rules that determine the relationship between the online data and the offline quantities of interest’.

Bias can then be modelled against ground truth data. If ground truth data do not exist, different hypothetical scenarios can be developed as plausible upper and lower bounds of estimates. Given that there are applications using digital data with elaborate post-stratification methods in other fields of study, such as voting (Wang et al. 2015), we are optimistic that the selectivity and non-representativeness of digital trace data will be manageable in many applications of interest to family researchers.

Drifting – i.e., the tendency of user populations and algorithms underlying online platforms to change in unknown ways over time – further limits the potential application of digital data to family-related research questions. For example, it is arguably the case that questions regarding changes in population-level family structures will continue to be better addressed using representative census or survey data, or using vital and residential register data, if they are available. Drifting also creates challenges for the post-stratification of digital traces when addressing longitudinal research questions. It is likely that accurate post-stratification will be far easier within a brief time window than over a longer time span in which compositional shifts in the user population or changes to the data-generating algorithm may have occurred.

Finally, the population covered in online platforms also tends to include bots that create systematic noise in the data through fake identities. The presence of such bots makes digital data ‘dirty’, and has led to serious misinterpretations of content (Salganik 2018), as well as to calls for extensive data cleaning (Mützel 2019). While statistical post-stratification can be done using known distributions in the population, data cleaning requires researchers to develop a different set of skills. For example, before analysing digital traces, researchers may want to identify and delete information from fake identities. Successfully performing both post-stratification and the data cleaning of digital traces relies on having an understanding of the social processes that create the biases. Therefore, researchers should gather as much information as possible, e.g., on the influence of bots in the digital trace data used, to address a specific research question.

For applied family researchers, there are two important points regarding the limited information on the population covered. First, many family-related researchers are interested in comparing groups for whom they do not need representative data at the population level. For addressing these types of questions, digital traces might be particularly well suited and relatively easy to analyse, although extensive data cleaning will still be necessary in most cases. As the skills needed for cleaning digital data differ from those needed for cleaning survey data, researchers will benefit from having opportunities to acquire both sets of skills (Mützel 2019). Second, addressing questions based on representative estimates at the population level will require considerable investments in learning how to combine post-stratification with other data sources. In the years to come, data cleaning and post-stratification skills will have to be actively developed in the digital social sciences (Salganik 2018).

2.2.2 Limited information on the data-generating processes

Unlike other forms of data researchers use, digital data are generated through the large-scale involvement of commercial companies, government agencies, as well as other organizations. In many cases, the information needed to understand how certain data were generated is not recorded or is not accessible to the researcher, and the underlying data production processes may change over time without the researcher’s knowledge (Lazer et al. 2014). Digital trace data might reflect the baked-in strategic decisions made by the platform designers rather than the natural behaviour of individuals; a process Salganik (2018) calls algorithmic confounding.

For example, Facebook encourages individuals to make more friends until they have reached 20 friends, and then stops. As a result, an unusually high proportion of Facebook users have exactly 20 friends, which would also bias the representation of family networks in Facebook data (see Salganik 2018 for an elaboration of this example). The design of online platforms, including their strategic interests, shape the data in ways that will often bias the estimates family scholars are interested in. In addition, digital data usually do not provide all of the information researchers need in order to capture their theoretical constructs. As a result of algorithmic confounding and incompleteness, the meaning of digital trace data is often ambiguous. What do 'likes' mean, and how do their meanings vary in different online contexts, or when a platform changes (e.g., when Twitter changes options for re-tweeting or Facebook adds a 'dislike' button)? In terms of custom-made videos and other graphical materials, it is often unclear who uploads what as a video or a picture to YouTube or Instagram, which uploads the platform's search engine show on a given device, and how the search algorithm changes over time (Legewie 2019; Legewie et al. 2019).

Applied family researchers might deal with these sources of bias in different ways. First, it is important to have as complete an understanding as possible of the platforms that are generating the digital trace data. What are the strategic interests of the organizations involved? Which algorithmic processes influence the collection of the digital traces? Were changes to the algorithm implemented during data collection? If too little information on these processes is available, or too much confounding is detected, then repurposing this particular type of digital trace for use in social research may not be possible (Salganik 2018). It may, however, be feasible to conduct small-scale studies that combine survey, qualitative, and even ethnographic data on the users of online platforms in order to contextualise the meaning of incomplete digital trace data.

2.2.3 Ethical sensitivity

Another key issue that arises in repurposing digital trace data for social science research is how to deal with the ethical challenges. The term 'digital traces' was first introduced by Latour (2007), and refers to the fact that digitalisation has increased the general traceability of human behaviour and interactions. 'It is as if the inner workings of private worlds have been pried open because their inputs and outputs have become thoroughly traceable' (Latour 2007, p. 2). This development can affect four basic principles of research ethics: beneficence, which means that a study's benefits should outweigh its risks, and that researchers should minimise the risks involved for participants or research subjects (RATSWD 2017, p. 10; Sumner, 2006, p. 96); respect for persons, that is, the acknowledgement of peoples' rights to self-determination, personality, and privacy (Gebel et al. 2015: §8–9; Salganik 2018, p. 295); justice, which calls for a fair distribution of a study's risks and benefits (Salganik 2018, p. 298); and respect for law and public interest, which refers to the importance of complying with existing law and ensuring transparency-based accountability in the research process (Salganik 2018, p. 300).

In contrast to respondents in survey and census data, users of online services have often not given explicit consent for their data to be used for research purposes, or at least are not aware that they have given consent. Research findings based on digital trace data can be highly sensitive. For instance, digital traces may be used to quantify local populations of vulnerable groups, include information on minors, or contain information on behaviour and actions that may be subject to prosecution by authorities. It took decades for the potential for human rights abuses based on census and survey data to become fully apparent, including genocide and

forced migration (Seltzer and Anderson 2001). There are many well-documented historical cases of devastating forms of population data misuse, which have triggered an intense discussion about potential safeguards (Seltzer and Anderson 2001). Moreover, according to recent studies, it is surprisingly easy to de-anonymise digital data, particularly once they are linked with other types of data (Salganik 2018). At the same time, the opportunity for data linkage greatly increases the potential pay-off associated with using digital traces. Against this background, rigorous adherence to research ethics and the development of effective de-anonymisation techniques have to be at the core of the field of digital social science, particularly given the massive involvement of private companies in collecting these data. Recent scandals involving Facebook are raising awareness about ethical issues around digital trace data, which are already the focus of emerging research (Cesare et al. 2018; Salganik 2018; Zimmer 2010).

3. CUSTOM-MADE DIGITAL DATA

Custom-made digital data are data that were purposefully collected by researchers to answer a specific question. These data are distinct from other types of custom-made data, such as data from classic surveys or in-depth interviews, in that digital tools were used to collect them (Salganik 2018, p. 7). Established research methods for purposeful data collection, such as in-depth interviewing, ethnographic field work, and survey research, have produced countless intriguing findings for family research, including on topics such as parenting styles and practices (Lareau 2003; Spera 2005; Steinberg et al. 1992), organisation of household and reproductive labour (Bianchi et al. 2000; Hook 2010), negotiation of gender roles (Bielby and Bielby 1992; Daly 2002; Sassler and Miller 2011), intergenerational relations (Bengtson and Troll 1978; Bengtson et al. 2002), and families as learning environments (Bäumer et al. 2011; Marjoribanks 2019). Custom-made digital data and research methods may be employed to complement these established methods, and could offer additional insights. The approaches that may be used range from digital surveys (Adolph et al. 2017; Runyan et al. 2013; Salganik and Levy 2015), to video data collection (Nassauer and Legewie 2018, 2019; Elsner and Wertz 2019), to digital field experiments and mass collaborative data collection (Bail et al. 2018; Cooper et al. 2010). Here, we will focus on two examples: digital surveys conducted with smartphone-based experience sampling methods (ESM), and video data collection.

ESM (Hektner et al. 2007; see Stone and Shiffman 1994 for a similar approach) were developed to investigate people's subjective experiences in situ, and the use of these methods is well established in research on physical and mental health, happiness, and emotional states (e.g., Brose et al. 2017; Cohn et al. 2011; Kimhy et al. 2006). In family research, ESM have been employed to study issues such as emotional transmission in families' daily lives (Larson and Almeida 1999), family communication and time use and their connection to adolescents' well-being (Offer 2013a, 2013b), and convergence of parents' and adolescents' emotional states (Larson and Richards 1994). But there are also ESM applications that have been used to study not just personal experiences, but social actions and processes (Zirkel et al. 2015, p. 7). In a pioneering application in family research, Lee and Waite (2005) studied the division of housework in married couples. Their findings indicated that husbands over-estimate their own contributions to household work, that couples have different perceptions of the gap in the household work performed by the wife and the husband, and that survey studies may

over-estimate overall time spent on household work. Such applications suggest that there is potential for a much broader use of smartphone-based ESM in family research.

Regarding video data collection, some studies have used new technologies to collect self-recorded video data. In an early example, researchers from the University of California Los Angeles Sloan Center on Everyday Lives of Families video-recorded families' morning, evening, and weekend routines (Ochs and Kremer-Sadlik 2013). Recently, the New Jersey Families Study placed auto-activated video cameras in up to four rooms in participants' homes for two weeks to study how families build skills in their pre-school children. In the field of developmental psychology, researchers use video recordings to study early childhood development and the family as a learning environment. Going beyond reliance on traditional approaches, researchers are increasingly using either custom-made or ready-made video data from real-life settings to complement laboratory experiments (Elsner and Wertz 2019).

3.1 Opportunities

The use of ESM and video data collection illustrates that there are a range of opportunities for applying custom-made digital data. Smartphone-based ESM 'enable us to learn about individuals' lives in context by measuring participants' feelings, thoughts, actions, context, and/or activities as they go about their daily lives' (Zirkel et al. 2015, p. 7). ESM are used to collect data by repeatedly sending study participants micro-surveys of only a few (closed or open) questions each that are triggered by a certain event, based on a time schedule, or generated at random over the duration of the study. Thus, ESM studies can avoid asking retrospective and generalised questions, and are instead able to collect data close to a situation or a process of interest, and to provide information on intra-individual variance through repeated measures (Hektner et al. 2007; Runyan et al. 2013; Salganik 2018; Zirkel et al. 2015). Hence, smartphone-based ESM have the potential to complement traditional methods in a number of ways. First, these methods address issues of ecological validity and retrospective generalised responses. ESM can be used to collect data on personal experiences, actions, and processes at various points in time and across environments throughout the course of a day, all in real (or close to real) time. As a consequence, smartphone-based ESM are better able to capture social processes and to provide more valid data than retrospective data from surveys or in-depth retrospective interviews. Moreover, compared with traditional surveys, ESM can provide a more nuanced, intra-personal view on a given phenomenon. For instance, in family research, smartphone-based data collection could be used to examine the relatively under-studied issue of the dynamics of resource activation in family networks (Dika and Singh 2002, p. 42; Portes 1998). Over the course of a set period, family members could be asked questions in the form of micro-surveys about situations in which they required help; transmissions of instrumental and emotional support; from which family members they received this support; whether they asked for help or received help without asking; and their experiences of these situations. The micro-surveys could be administered several times a week, yielding detailed information on personal network dynamics.

The opportunities for using video data collection in family research have increased dramatically since the early 2000s. Video equipment has become so affordable and relatively unobtrusive that conducting studies in which video data are collected directly in families' homes is becoming a viable option. Such videos capture the sequential nature of interactions, and because they provide extremely detailed information, they allow researchers to trace the

dynamics of such sequences in unprecedented detail. Researchers can use videos to study behaviour, interactions, and situational dynamics and their impact on the social outcomes (e.g., Nassauer and Legewie 2018, 2019) and patterns in communication (e.g., Norris 2004) that are central for understanding dynamics in families. For instance, video data could be used to study situational negotiations of gender roles or the division of household labour; what norms or narratives are invoked in such situations; what emotional dynamics are at play during negotiations; and how negotiations play out within the larger context of the family's and each individual's daily routines.

In principle, both ready-made and custom-made video data could be used to study family interactions that either take place in a given space, such as the home, or that revolve around a specific type of event, such as a wedding, a family dinner, or even a large-scale public event. One of the biggest advantages of using video data rather than participant observations and in-depth retrospective interviews is that such data provide situational information with unprecedented levels of detail and reliability (Nassauer and Legewie 2018, pp. 6–7). Video data enable researchers to conduct in-depth, second-by-second analyses of social situations, as they offer the option of rewinding the video or watching it in slow motion to focus on even fleeting pieces of information (such as facial expressions); or of reconstructing the exact sequence of interactions frame by frame, even during long and complex situations (Nassauer and Legewie 2018, p. 8). The use of video data also increases the reliability of findings because multiple researchers can analyse the same raw data material (Nassauer and Legewie 2018, p. 8). For instance, in addition to being employed in analyses of the family as a learning environment, the New Jersey Families Study data mentioned above could be used to study negotiations around reproductive labour in families. Situational negotiations could be analysed in great detail, with verbal content, body language, and the use of space and symbolic actions being examined to gain a more detailed picture than would be possible using survey data, in-depth interview data, or even participant observation data.

3.2 Challenges

Overall, ready-made and custom-made digital data offer researchers rather distinct complementary opportunities (see Table 6.1). The challenges that arise for researchers when using these data overlap considerably, and are in part the same challenges that arise when using other types of data. As custom-made digital data may be collected with a broad range of methods, their use may entail a diverse set of challenges. Here, we focus on three challenges researchers commonly face when using both ESM and video data collection approaches.

3.2.1 Limited information on individuals and the context covered

Smartphone-based ESM and video-based research may provide limited information on the individuals covered and the context of the behaviour and interactions, albeit in different ways. Smartphone-based ESM are not geared towards administering long surveys, which limits the amount of background information researchers are able to collect using these methods. Video-based research provides less tacit knowledge than participant observation. Being physically present in a social environment over long periods of time, and being able to absorb that environment with all human senses, can provide a fuller picture than video data alone (Nassauer and Legewie 2018, pp. 25–6). Moreover, such data may not supply enough background information about individuals and the physical and social context in which

a situation takes place. Mixed-methods approaches can help to overcome these challenges. Smartphone-based ESM studies can be integrated into existing in-depth interview studies or cross-sectional or panel surveys that provide relevant background information on individuals. For video-based studies, researchers may consider conducting surveys with participants if they collect video data themselves (as researchers did for the New Jersey Families Study), contacting uploaders of online videos to interview them, or collecting additional non-video data online (Nassauer and Legewie 2020).

3.2.2 New skill set requirements for researchers

Smartphone-based data collection may require building an app and an infrastructure to collect and store the data; processes with which many social scientists may be unfamiliar. Moreover, while this method has been tested, and is an established tool that is mainly used for collecting data on emotional states, it has been used much less frequently to study processes such as personal network dynamics. Thus, when using this approach, researchers may need to develop new ways of improving data quality and reducing total survey error (i.e., coverage error, unit and item non-response, measurement error; see Biemer et al. 2017; Groves and Lyberg 2010). In terms of video-based research, most researchers are not trained in, and are largely unfamiliar with, the use of video data (for an introduction, see Nassauer and Legewie 2018, 2019; Norris 2004; among many others). In addition, since video recording devices have been widely available for a much shorter period of time than voice recording devices, video methods still require a great deal of development. The use of custom-made online video data can present further challenges. Like the new techniques necessary for cleaning ready-made data, these are challenging issues in the current context, but the potential solutions are relatively straightforward. Interdisciplinary collaboration can help researchers conduct studies for which they lack certain technical skills, and further methodological development and training can empower researchers to tackle some of the open methodological questions, and to familiarise themselves with the methods.

3.2.3 Ethical sensitivity

The use of smartphone-based ESM has been shown to carry a considerable risk of reactivity; that is, of participants adapting their behaviour because of the study. While this tendency can be desirable, and even suggests opportunities for conducting intervention studies (Runyan et al. 2013), it may also have unintended consequences, disrupt participants' lives, and undermine the quality of the data. Using video data may present research ethics challenges, mainly regarding informed consent. When filming in a family home, such as in the New Jersey Families Study, it becomes a challenge to ensure that everyone shown in a given video consented to being filmed (but see Golann, Mirakhur and Espenshade 2019 for how to handle this challenge). The same is true for online video data, and in addition people may not have agreed to that video being uploaded online (see Section 2.2.3; Legewie and Nassauer 2018, p. 6ff.). To tackle this set of challenges, researchers must engage in careful preparation and reflection. When applying ESM, it is crucial to ensure that the participants are briefed in detail about what their participation may entail, including the possibility of fostering reflection on and changes to their behaviour (see Sugie 2018 for an exemplary approach to participant briefing). When performing video-based studies, researchers should reflect on the type of video they are using and the context from which the data are being collected, and weigh the advantages of these approaches against other dimensions of research ethics, such as the unique opportunities and

the potential harm associated with the research (for a guideline, see Legewie and Nassauer 2018, 2020). Depending on the specific research context (such as the type of behaviour under study or whether faces are visible in the videos), lack of informed consent may be evaluated as more or less problematic.

4. OUTLOOK

In response to the digital data revolution and the declining quality of costly conventional survey research (Keeter et al. 2017; Salganik 2018), social scientists are increasingly exploring newly available sources of digital data, and techniques for analysing these data. New digital data collection tools developed for research purposes are often far more cost effective than conventional approaches, and can open up entirely new lines of inquiry. While the use of digital data will certainly not provide answers to all questions in family research, scholars in this field should attempt to identify the areas in which digital data can be employed most effectively to complement the use of conventional data sources and data collection strategies. In this chapter, we discussed the opportunities as well as the methodological and ethical challenges associated with using two different types of digital data to investigate family-related research questions: 1) ready-made digital data, i.e., digital traces that emerge as a by-product of other processes, and are repurposed for family research; and 2) custom-made digital data, i.e., digital data that are purposefully collected with new digital data collection tools in order to conduct family research. We presented the opportunities, the challenges, and the areas of application in family research associated with both types of digital data. While using ready-made and custom-made digital data offers complementary opportunities, the challenges involved in using these data overlap. Among the issues that can arise in using these data are having limited information to contextualise the meaning of the digital data, needing to develop new skill sets for collecting and analysing these types of data, and ensuring the ethically responsible use of these data for research purposes.

We conclude by observing that the use of digital trace data is particularly promising for addressing research questions for which other data do not exist or are difficult to collect, and when combined with ‘traditional’ forms of data from surveys and administrative records (Billari and Zagheni 2017). The study of digital trace data may prove especially helpful, as such data can be used to study small subpopulations that are difficult to reach and/or tend to be under-represented in surveys (e.g., single fathers or LGBTIQ community); self-representation and family norms; family time use and division of labour; and group comparisons (rather than representative population estimates in family research). Post-stratification, data cleaning, and effective anonymisation, as well as securing the active consent of participants are the core areas in which advancements are needed to enable researchers to fully capitalise on the potential of digital trace data.

In examining the use of custom-made digital data, we focused on smartphone-based ESM and video data collection. These methods are particularly promising if researchers are attempting to study real-life actions, interactions, and situations in the family to gain detailed insights into micro-level processes. Setting up a series of tailor-made micro-surveys delivered to respondents’ smartphones throughout the day, or collecting videos of real-life family interactions in situ, can provide researchers with unprecedented glimpses into everyday family dynamics. These studies may include questions on a range of topics, including on family inter-

actions, role negotiations, and resource activation in family networks. ESM and video data can also be used to complement digital trace data when studying family time use and division of labour, as well as self-representation and family norms.

Both ready-made digital traces and custom-made digital data can be analysed using quantitative or qualitative methods. The qualitative content of big data sources such as Facebook and Twitter posts – which has received much more attention in political science than in demography or family research – could prove particularly valuable for theory development, as selectivity and non-representativeness are less problematic in this context (Fasang 2018). By drawing on the advances and innovations in digital research methods that have been made in recent years, family researchers stand to benefit from new opportunities and ways to tackle some of the core questions in the field.

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NOTE

1. For the Google Trends service, visit <https://trends.google.com/trends/>. Owing to low usage, the Google Correlate service shut down on 15 December 2019.

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7. Qualitative longitudinal research in family sociology

Laura Bernardi

1. INTRODUCTION: WHEN QUALITATIVE RESEARCH GOES PROSPECTIVE

The combination of qualitative interpretative approaches and longitudinal research designs, although not new in the social sciences, is gaining increasing recognition as a useful and even necessary avenue to explore family changes as they occur. Qualitative methods, whether longitudinal or not, emphasise the understanding of meanings, subjective experience, and agency. The use of such methods can improve our comprehension of how people choose a given alternative and reject another, and how they adjust or fail to adjust to their living circumstances. At the core of qualitative investigation is also an interest in understanding the meaning of the experiences of social actors in their social contexts. In family research, numerous one-off studies have investigated how different individuals and groups create, interpret, and negotiate family relationships, roles, and transitions. The longitudinal approach adds to this tradition by focusing on the course of events, as well as on the processes of change, stability, and continuity through time. At the individual level, the combination of qualitative and longitudinal research enables us to capture how individuals create meanings about the turns of their lives and their circumstances as they unfold. For instance, it is indispensable to investigate how processes like those initiated by a chronic disease, a union dissolution, or the experience of social discrimination unfold from specific socio-cultural and biographic perspectives. While one-off qualitative approaches are widely used in family sociology and have often collected retrospective information, until recently, longitudinal prospective methods were more popular in quantitative studies.¹ They are generally used to describe and measure the objective aspects of change, such as personal and social trajectories, like family relations and biographic events associated with educational, employment, and residential careers. While quantification assesses the regularities and the probability of the occurrence of social dynamics, such data are thin when it comes to accounting for the logic of the actions that underlie them. In contrast, by investigating agency and meanings, qualitative longitudinal research (QLR) has the potential to unravel the complexity of changes that are involved in the making and the unmaking of family relationships across the life course. This will not come as a surprise if we think of both agency and meanings as dynamic objects of study: individual agency co-produces the processes through which individuals live and, therefore, their experiences of change. Subjective meanings are shaped by social interactions, and shift in relation to life course events and transitions.

QLR has started accumulating rich data on relational practices and multidimensional experiences of family and childhood across the life course, with change and temporality being central to their interpretation. Change can be conceived and qualitatively analysed at levels beyond just that of the individual, including at the couple, group, institutional, and societal

levels. For instance, family researchers have looked at how couples live through the transition to parenthood before, during, and after the birth of the first child (Girardin et al. 2019; Grunow and Evertsson 2016; see also Grunow in this volume); or at the moment of divorce and during a given period after it (Smart and Neale 2007). At the group level, researchers have observed how the social networks of intimate ties are agentively mobilised and reshaped around a major family transition like a birth or a death (Bidart 2008; Hollstein 2002). At the institutional level, the focus may shift to changes in family laws (i.e., homosexual couples' rights to marry, adopt, or have a child; the regulation of rights and duties between ascendants and descendants) and family policies (i.e., parental leave or public child-care provision policies), and the ways these laws and policies are constructed, justified, and negotiated within a given society. In all cases, prospective qualitative research would aim to shed light on the subjective and processual character of social life.

As well as following individuals, groups, or institutions, QLR has the potential to capture the shifting temporal nature of the data, and, therefore, the researcher's temporal perspective. The temporal orientations of the data reflect the fact that they may be retrospective (narratives of life history), prospective (private letters), or both (repeated interviews). Similarly, at the moment of data analysis, the temporal gaze of both the participants and the researcher is often multidirectional, since present, past, and future may be anticipated and reinterpreted (Neale 2020; Sanchez-Mira and Bernardi 2020). Qualitative longitudinal studies often combine prospective follow-ups with retrospective biographic narratives of the past in their data collection (Scott and Alwin 1998). While longitudinal data can be purely retrospective, a prospective approach makes it possible to collect data that represent different 'presents', and to enrich the analyses with the present interpretation of the different 'pasts' and the different 'futures'.

QLR is, of course, not new, and it existed before it was labelled as such and identified as a separate, specific research approach by a number of recently published methodological handbooks. QLR has an established presence in several disciplines, including anthropology, criminology, psychology, social policy, and sociology. Consequently, a variety of disciplinary and sub-disciplinary terms, like prospective, follow-up, and qualitative panel studies, are often used interchangeably to refer to QLR (Holland et al. 2006). Examples of the most commonly used QLR designs include ethnographies of small communities over time, research conducted in the same fieldwork setting with long time intervals between visits, repeated interviews at given intervals of different durations, and cross-generational research.

These QLR approaches also have different time scales, with some designs being more time-intensive, and others being more time-extensive (Epstein 2002). Generational studies and community studies can stretch over decades (Brannen 2006). In the case of repeated interviews, participants are typically observed over at least two or more regular intervals of months or years. This latter approach is typically used in family research (see Section 2), but is also very frequently applied in youth research that looks at educational aspirations, choices, and future planning (Woodman 2011); and in health research that examines illness or recovery trajectories (Fadyl et al. 2016; SmithBattle 2018). Longitudinal video documentaries such as *Seven Up*,² *Child of Our Time*,³ and *Les bonnes conditions*⁴ are popular and fascinating series of repeated filmed interviews that have followed youngsters of various social backgrounds across their life course transitions, from childhood, to adolescence, to well into adulthood.

Recently, a few methodological overviews have been published in the form of books or special issues that have pointed out the similarities among the different types of qualitative methods used in longitudinal research (Hermanowicz 2003; Neale 2020; Saldana 2003;

Thomson and McLeod 2015). Such overviews were theoretically informed by the main principle of the life course paradigm (Elder et al. 2003), which states that the interdependencies between individual life trajectories, the societal conditions in which they evolve, and their unfolding through time are central to explaining both individual development and social processes (Bernardi et al. 2019). In this chapter, I first draw on these synthetic overviews to describe the essential features of QLR, which include change and temporalities. I then present a few studies to highlight the relevance of taking a longitudinal qualitative approach in family sociology. In Section 3, I outline some of the most important challenges that can arise in the conception and the realisation of QLR. Finally, I outline what appear to be the most promising emerging paths in QLR.

2. SUBJECTIVITY AND TEMPORALITIES

Most qualitative research engages with the concepts of human agency, meaning making, and subjectivity as the actor's personal interpretation of his/her own experience (Heinz 2016). This type of research is invaluable for generating new research questions and advancing sociological theory. In sociology, QLR has been mostly employed to look at how people decide upon or adjust to life course transitions. While agency, meaning, and subjectivity are central to all qualitative approaches, longitudinal qualitative research has a fundamentally different focus, as it can be retrospective, prospective, or both. The most important difference between longitudinal and other types of qualitative research is that in the former, time plays a role in the interpretation of the results. Most longitudinal family research is based on a retrospective biographic component that is integrated into a one-time study, which results in the collection of life histories (Riessman 1991). The focus of life histories is to capture the subjective sense-making and causality assumptions of individuals with regard to the decisions and the outcomes that shaped their biographies. A retrospective approach is longitudinal, since it reconstructs the past and individuals' accounts about life course changes; and it can also be projected into the future by capturing individuals' present reflections, aspirations, fears, and intentions.

It has been argued that one-time retrospective approaches suffer to a greater or lesser degree from the deterioration of reliability and validity concerning the past, particularly if the time scale is too long (e.g., older people's life histories). However, research in social psychology has indicated that such biases in personal life narratives are important components of the self (McAdams 2008), as life narratives represent 'internalized and evolving stories of the self that people construct to make sense of their lives in time' (McAdams 2005, p. 241). Such narrative identities (Singer 2004) reconstruct the past in a selective way and anticipate the personal future, infusing biographies with coherence and purpose as life goes by (McAdams 2008). Similarly, the literature on biographic narratives shows that with the accumulation of new experiences or changes in motivations or concerns, the meanings people associate with past events may also change, with some taking the spotlight and others fading out (Hareven and Masaoka 1988; Schütze 1980 cited in Bertaux and Kohli 1984, pp. 222–3). These ideas connect with Flaherty's (1999, 2003) notion of 'time work'. An individual's 'time work' is the efforts s/he makes to promote or suppress particular forms of temporal experience by controlling or manipulating duration, frequency, sequence, timing, and allocation.

One-time biographic narratives do not allow for comparisons of closer and more distant accounts of the same event or transition, and of the various perspectives that emerge during critical life course phases. By contrast, repeated interviews allow for both the collection of more recent accounts and the analysis of changes in subjective perspectives over time. A QLR approach has a specific interest in the continuously evolving interpretation of the past and the future under subsequent present conditions.

However, not all qualitative research over time is longitudinal. In addition to being based on a design that includes data collection over time, QLR has theoretical and analytical frames that explicitly address processes and temporality; i.e., that change over time together with the mechanisms of its maturation (Saldana 2003). As Thomson et al. (2003, p. 185) observed, what distinguishes longitudinal qualitative research is ‘the deliberate way in which temporality is designed into the research process making change a central focus of analytical attention’. In other words, QLR is performed not just over time, but through time. Thus, QLR explores the nature of time, or the temporal dimension of experiences.

QLR focuses on the understanding of temporal processes by means of a processual analysis (Abbott 2016). Processual analysis considers processes in a narrative perspective, whereby the weight of each of the different elements of the process depends less on its presumed objective relevance, and more on the extent to which it makes sense to the subjects, and on how this sense shapes their future orientations. By focusing on the prospective character of longitudinal research, we improve our comprehension of the relationship between present situations and narratives, future actions, and retrospective meaning making. For instance, in biographical interviews with elderly individuals (over age 75), Bornat and Bytheway (2010) clearly showed that time modified the individuals’ interpretations of their experiences by comparing the interview material with the individuals’ personal diaries at younger ages. Thus, the retrospective views of past experiences provided at older ages contrasted with the emotions and contingencies of the present that were captured in the diaries. Here, the prospective component is composed of the written data of the diaries, which were written following or anticipating the vagaries of people’s lives.

To better clarify how temporality is central to qualitative longitudinal analyses, I will extract an illustrative case from the ongoing project ‘The multiple paths of lone parenthood’ (Bernardi and Larenza 2018). The data collected include narrative interviews, biographical calendars, and social network data. The longitudinal research design of the project was to generate retrospective biographical data that reconstruct the transition to lone parenthood within a prospective research design component in which objective and subjective changes were tracked. The case study is that of Anouk, a lone mother in her 30s. During the three interviews conducted over six years, Anouk reported on her transition to lone parenthood, and on her troubled relationship with the father of her child in the period that followed. At wave 1, she had left the common household to go back to live with her parents, after a back-and-forth period in which she had got her hopes up on several occasions that her partner would be sober enough to visit their child, who was aged four at that time. While the event that led to Anouk moving out of the couple’s home was that he once again drank during his medical treatment, the decision to leave was clearly also based on accumulated stressors that were interpreted retrospectively as a series of ‘trigger points’ that eventually reached a point of no return. Two years later, at wave 2, Anouk had resumed an ambivalent relationship with the father of her child. The father said he would take care of the child more frequently, and he even slept in their apartment occasionally. At this point, Anouk’s aspirations for the future were to become

a 'regular' family again. After three more years, at wave 3, the couple had separated again, and this time definitively, according to Anouk. At this point, her emotional descriptions of the ups-and-downs of his drinking trajectory and her hopes and feelings of betrayal had been substituted by a coherent reconstruction of a relationship that was doomed to fail from the start. Having definitively separated from her partner, Anouk was framing these previous events and circumstances within a lifetime horizon in which the contingencies of everyday life were accompanied by emotional and temporal distance.

This case shows how events, motivations, and emotions in the past are reinterpreted in the present in order to give sense and coherence to biographies in the making. QLR approaches provide unique empirical data on family processes as they are experienced. On the one hand, the ability to observe and situate individuals' changing perspectives over life course transitions across different present times (at each subsequent wave of data collection) distinguishes prospective QLR from both one-off qualitative analyses and life histories. On the other hand, QLR complicates the understanding of processes over time that are typically investigated by quantitative longitudinal analyses, because it adds to the information on the durations and the sequencing of events and transitions, the subjective meanings that are progressively attributed to life trajectories in the making, and the related experiences of time throughout these processes.

3. EXAMPLES OF PROSPECTIVE QUALITATIVE RESEARCH IN FAMILY RESEARCH

There has been an increasing interest in family research in the temporal unfolding of lives, and of notions like 'trajectories' or 'careers' (e.g., partnership trajectories). In family research, quantitative longitudinal research is now commonly used to examine life trajectories, events, and transitions, as well as changes in attitudes and values related to family practices and regulations. Sophisticated statistical methods of description and analysis, such as sequence and event history analysis, have flourished, making it possible to test hypotheses regarding the determinants and the consequences of family dynamics. However, while such methods are tailored to test hypotheses, they are less useful for generating new hypotheses. Developments in family theory often come from analyses of people's subjective experiences, which consist of the meanings and the expectations associated with family events, transitions, and relations; and of their changes over time and through time (e.g., how people respond to different forms of relationship losses and family reconfigurations).

While much of this prospective research is quantitative, the few existing prospective qualitative studies that have been conducted have revealed the subjective side of family trajectories. Most of these studies were based on repeated interviews of research participants who were selected to report on a particular experience, event, or transition (e.g., divorce, parenthood, widowhood), and were then followed over more or less regular time intervals. In other prospective qualitative studies, the research participants were chosen because they belonged to the same age group, cohort, or community. In this section, we examine the added value of QLR for family research. Providing a complete overview of the range of approaches available in prospective qualitative research exceeds the scope of this chapter, which concentrates on the method used most frequently in family research: namely, conducting repeated waves of interviews.⁵ Studies of children and youth in particular have employed repeated biographical inter-

views with participants to follow them across their differentiating lives and transitions. While these kinds of studies are usually independent and self-contained, they are sometimes – albeit far too rarely – related to larger population-representative panels (Legewie and Tucci 2020).

3.1 Experiencing Family Processes

The more important contribution of prospective qualitative research to family studies is that it allows researchers to study family processes as they are being lived through by the actors. Thus, this research approach is able to capture meanings, norms, hopes, and fears around key life events and transitions, such as marriage, birth, parenting and grand-parenting, divorce, and the death of intimates; as well as related processes, such as the formation and dissolution of relationships, or negotiations between parents about home and work responsibilities.

In their study of youth transitions in France, Bidart and Lavenu (2005) followed young men and women aged 17 to 23 over three years. In each of the three waves, the development of the young people's personal networks was linked to the events marking their entry into adult life. The results showed that partnership formation affected the young adults' sociability by first expanding the size of their social networks, because partners pool friends; and, then, when the new couple had moved in together, by reducing it, as domestic life was prioritised. The study also found that having a child further contributed to couples' 'isolation'. While similar trends have often been reported in quantitative analyses of social networks and family formation, the prospective qualitative approach shows that the restriction in sociability that came with forming a union had positive connotations for young couples and parents; i.e., that they seemed to appreciate the out-selection of superficial relationships, and the calmer and less scattered lifestyle that followed (Bidart and Lavenu 2005).

Keddi et al. (2003) studied the changing work and family life plans of women in eastern Germany around the time of German reunification, and in the period thereafter. Over seven years (1991–98), they conducted four interviews with an initial sample of 125 women who were born in Saxony and Bavaria, and were aged 18–27 at the time of the first interview. The researchers were interested in understanding how the women were thinking about their future, and followed them while their biographies were unfolding starting in early adulthood. The results showed that the differences in the choices and the scopes of the women's lifestyles were shaped not only by their life circumstances, but also by 'life themes'; and that the latter were already emerging in the women's early adolescent years, and were often maintained as life orientations thereafter. The study found that the eastern German women of these cohorts uniformly described work and family as parallel and dominant life themes, whereas the western German women reported multiple life themes.

Girardin et al. (2019) interviewed 31 Swiss couples three times: during pregnancy, four to six months after childbirth, and about a year after childbirth. Using qualitative materials drawn from these three waves, they collected data during pregnancy, at a point when parenthood had become an everyday reality, and at a point when the mother had returned to her job after maternity leave. They analysed the intention to share tasks after parenthood and the reasons for succeeding or failing to do so. Couples who had planned to have a non-normative (more gender-egalitarian) division of tasks after parenthood did not always manage to do so. The researchers showed that there was variation in the extent to which men and women adapted to their new care obligations, but also that there was less variation in the arguments they gave for doing so. This was partly because they were not able or willing to resist cultural and institu-

tional settings that pushed them towards adopting more traditional practices and roles during the transition to parenthood. At the couple level, economic and career considerations were frequently mixed with the internalised norm that the mother was the natural primary caregiver, even in the rare cases in which the woman was earning more than the man. The study also found that Swiss family policies that put less pressure on couples who adopted a traditional one-and-a-half earner model, while penalising couples who adopted a dual-earner model, played a key role in the couples' decisions. Only by capturing the fundamental coherence of both partners' perspectives through subsequent open questions about the meanings and the subjective experiences associated with the adjustment process were the researchers able to capture the interdependence of individuals' agency and the context of shared meanings.

In the examples above, researchers conducted repeated interviews with the same individuals at different moments in time. This approach enabled them to compile separate datasets for each survey wave that represent different real 'presents' in which the individual and the contexts are synchronously discussed in their objective and subjective aspects. The collection of data on the individuals' evolving subjective perspectives, as well as on objective biographical developments, enables researchers to better understand family transition processes, and to contextualise them within subsequent historical periods. Thus, it is possible to compare people's situations and life plans with their achievements, but also with their plans at another point in time (Longo et al. 2013). Changes in values can be examined, including the effects of background social factors on values, particularly changes that occur in response to lived experiences, such as work experiences (Johnson 2002).

3.2 The Relationship between Institutions and Families

Longitudinal prospective designs allow researchers to study how biographies intersect with policies and practices. How such an unfolding process can shape lives through priority setting in changing circumstances was explored by Millar and Ridge's (2013) 'Family Work Project'. This project is a qualitative prospective study of the everyday management of work and care responsibilities by low-income British lone mothers enrolled in a welfare-to-work programme, which was designed to facilitate the transition from being a social benefit recipient to being a working mother. The study examined the views of 50 mothers and 61 children (aged eight to 14 at the time of the first interview) between 2004 and 2007 (three waves of interviews). The discussion of the findings highlighted that the sustainability of paid employment was constantly questioned by the participants, because being a working lone mother meant involving the whole family in a different configuration, and was not just about one person having a job. Understanding what forms of agency a mother and her children had when taking a job, arranging care, and claiming tax credits and benefits implies understanding the margins of choice they had, and how the policies worked in practice. The mothers were continuously exploring opportunities for adjustments over time, since changes in employment meant that they had to find new job-compatible arrangements. In reporting the many challenges they faced, these mothers made clear that their aim was to integrate their employment into everyday family life and practice, and that they would evaluate any solution or compromise based on whether they thought it was in the best interests of their family. Thus, in their view, work had to fit with family life, and not vice versa. As this example shows, understanding family functioning and configurations in their social context is important not only to advance social theory at a time when families and family relationships are becoming increasingly diverse, but to improve our

ability to define the policy priorities affecting families, and the efficacy of such measures. A qualitative approach can tell us how a policy programme is being delivered, the range of issues that emerge among programme participants, and how the programme is being received. QLR is suitable for evaluating family policies, as it can increase our understanding of the delivery, impact, and durability of outcomes from interventions.

A study of the transition to lone parenthood in Switzerland based on interviews with 40 lone parents who were interviewed shortly after the transition to lone parenthood and three years later highlighted the moral dilemmas mothers sometimes faced when they tried to claim their rights in relation to their children's non-residential parent (Larenza 2019). For instance, the analysis showed that some of the mothers who did not receive child maintenance payments from their former partner did not act in response to this violation of their rights. The main reason they gave for failing to do so was that they believed that starting a legal procedure and filing a claim could endanger their children's relationship with the other parent. Some mothers tried to adjust to such situations by increasing their own income from paid work, which had repercussions in other life domains. For example, when these mothers increased their working hours, they often struggled to find appropriate childcare (Struffolino et al. 2020). The author concluded that even welfare institutions that are designed to protect lone parents against poverty and overburden fail to realise that lone mothers' choices are primarily guided by their 'ethic of care'. Post-divorce mothers showed a similar level of reticence in negotiating divorce terms in the study conducted by Smart and Neale (2007). The study analysed the shifting family practices at the moment of divorce, and 12 months later. During this transition period, in which the former partners were negotiating care arrangements and maintenance duties, moral dilemmas often arose. They found that in some cases, the mothers were not able to end what had been an unequal relationship through separation or divorce when co-parenting was involved; and that they often accepted unequal arrangements, as their choices were morally motivated (avoiding harm to children and sustaining connections with the father), even when these choices were very costly for themselves.

These studies reveal that when parents negotiate union break-ups and their consequences, they consider the available options in relation to significant others, even when conflict is present. For example, mothers are often willing to take into account their ex-partner's financial hardship or health difficulties during negotiations. Such findings have important consequences for family law professionals and for social policies, since they illustrate that family members remain related through moral dilemmas constructed around the perception of other people's needs that go beyond the legal and policy rationales. Including what matters to people is crucial to ensure that interventions work and that laws are perceived as fair.

3.3 Populations Who Are Hard to Reach or Hard to Follow

The third added value of prospective qualitative studies in family research is that they can address populations who are hard to interview in a survey, such as underage children or women who are victims of abuse and violence (Burton et al. 2015); or populations who are hard to study through larger panel data collection efforts because their initial sample sizes are small, and because the likelihood of losing them to attrition over time is relatively high, such as the fathers of children born to underage mothers or lone mothers on social assistance benefits.

Neale and Flowerdew (2003) showed that children who were interviewed at the time of their parents' divorce, and then four years after the divorce, adjusted to subsequent family

transitions in an active and often resilient way. The study found that the pace and the nature of changes in the children's families, but also in other areas of their lives, defined the concerns they had between ages 11 and 17, and their long-term reflections on post-divorce family life. The longitudinal aspect of this research could be used to explore whether the children's views and feelings were in line with presumptions made by the legal and welfare systems about their best interests through the various post-divorce phases (Smart et al. 2001). When one of their parents re-partnered, the children said they appreciated the economic benefits and the new activities they were able to engage in with the stepparent, as well as their parent's increased happiness. At the same time, they were critical about having to negotiate new rules and to adapt to stepsibling relationships. Thus, it appears that children's 'psychological travelling time' (Giddens 1992, p. 103) from one situation to the next is crucial for understanding the process leading to children's outcomes after parental separation. Public policies designed to support children in overcoming parental break-ups should therefore consider children's experiences in such circumstances.

Neale and Patrick (2016) followed 12 low-income young fathers, and described the shifting nature and the quality of their relationship with the mother of their child. The longitudinal aspect focused on the fathers' engagement with their child over five waves of interviews between 2010 and 2014, and a refreshment sample over 2013–14. These men learned they were going to be a father at a young age (half of them before age 16, the rest before age 24); some were in a relationship with the mother at the beginning of the study, while others were not. The interdependent nature of the sexual, relational, familial, socio-economic, and health-related issues that arose in the transition to fatherhood, and in the subsequent relationship with the child, were explored through the repeated, open-ended interviews. The analysis identified the main factors that explained the different degrees and kinds of engagement these fathers displayed in their relationship with their child. The study concluded that 'the ethos of engaged fatherhood' (Neale and Patrick 2016, p. 33) required elements that were often not necessarily within reach for these young men, such as material and emotional resources for joint parenting; adequate standards of care; emotional maturity and commitment; and a positive relationship with the mother of the child. Based on this perspective, policies designed to improve the situations of children born to underage parents could be adjusted to empower young fathers to engage in a sustained relationship with their new-born child by helping them build their relational skills.

From the few examples above, it appears that QLR is already enhancing the knowledge we have on family configurations and dynamics that comes from large-scale panel studies. It contributes to family research by zooming in on the subjective experiences of events and transitions, which can improve our understanding of how biographical pathways within families are constituted and negotiated, and what ethical considerations and life themes are guiding people in these situations. Thus, QLR can shed light on moral dilemmas in which the actor must consider two or more moral values, but can only honour one of them. Such situations are abundant, especially during family transitions that create critical disruptions of the previous normative order. QLR can be used to document changes and adaptations in family configurations that result from non-normative trajectories by stressing the significance of the timing and timeliness of these transitions, and the perspectives of actors who tend to be less heard in such processes, like minor children.

4. CHALLENGES AND OPPORTUNITIES IN QUALITATIVE LONGITUDINAL RESEARCH

Despite its unique strengths for understanding family dynamics in the ways discussed in the previous sections, QLR is still less developed in family sociology than it is in qualitative cross-section studies or quantitative panels. This is in part because the opportunities opened up by QLR are counterbalanced by its substantive challenges. While some of the challenges that arise are common to all longitudinal research (high costs, time scales, number of passages and their frequency, sample attrition and retention), others are specific to QLR, particularly problems related to managing flexibility in research design and analysis, multiple analytical perspectives on time and change, and the ethical questions raised by having repeated and often highly personal research interactions with participants.

4.1 Flexibility

A major advantage of QLR – which also represents one of its major challenges – is its open character and flexibility. On the one hand, development and innovation can take place throughout the entire research process. On the other hand, changing samples, protocols, and the analytical focus requires that researchers are able to describe in fine detail all of the sources of variation that accumulate over time (Koro-Ljungberg and Bussing 2013; Vogl and Zartler 2021).

Among the decisions involved in the process of data generation are decisions about the number and the frequency of data collection episodes, which primarily depend on the phenomenon under study (Saldana 2003). These aspects are not always anticipated. For instance, a one-time visit can span several decades through generational or family chain sampling, as in the case of the study ‘The Making of Modern Motherhood’ (Thomson 2011), which analysed the critical moment of biographical and family change, the transition to parenthood, as the arrival of a new generation in the extended family. Six of 12 intergenerational chains were followed up two more times, which created an intergenerational sample that allowed researchers to study in depth the process of changing configurations in family relationships after parenthood. In such cases, the separation between the research design and the research process decreases. Since a prospective longitudinal approach requires researchers to adapt to what they learned in the previous wave in order to address change in the subsequent wave, making decisions about data generation over time becomes an iterative and complex process. Accordingly, the study can grow by, for example, progressively including younger or older generations; or it can contract over time.

The flexibility of QLR may affect sampling. Progressive sample focusing carefully selects sub-samples that can be singled out for more detailed attention or more intensive tracking, and leaves aside the rest of the available baseline sample (Pollard 2007). The chosen sub-samples are likely to offer greater insights into the themes of the study by, for example, exemplifying those individuals undergoing further transitions, or those individuals with particularly distinctive or diverging trajectories. The full baseline sample may then be followed up with less intensity and/or frequency (e.g., interviewing via telephone or online rather than in person). Shirani et al. (2012) drew on two case studies of men who became fathers for the first time in 2000 from a wider sample of 46 men. The funnelled second-wave sample focused on the

men's relationship to involvement and the linked concepts of exclusion and redundancy; i.e., on terms that emerged from the data and changed over time in the men's accounts.

Flexibility can also characterise fieldwork timing. Understanding family change over time can involve mapping the related changes in circumstances. Since it is hard to say when change will occur, it is a strength of the prospective approaches that it can be adapted to the timing of the fieldwork. In a study of people undergoing a degenerative disease, the researchers decided to have monthly telephone calls with half of their sample in addition to having biannual face-to-face interviews in order to compensate for the high attrition due to death (Carduff et al. 2015). This level of contact intensity allowed the researchers to gain a real-time impression of how the illness progressed, and to map the ups and downs typical of people facing cancer. Extending such a flexible approach to delicate and dynamic processes in family research – such as domestic violence, child custody arrangements, and parent–child relationships during major transitions, like leaving home – would be straightforward, and would likely be a fruitful research endeavour.

Flexibility in QLR means not only that the sample and the timing can be modified, but also that the researchers and the respondents face additional challenges. Compared with longitudinal retrospective qualitative approaches, QLR is costlier not only in terms of the budget, but also in terms of the amounts of time and the levels of engagement and flexibility required of the research team and the participants. Specific extra measures are needed to attach participants and researchers to the project (Farrall et al. 2016; Weller 2010). Moreover, efforts to retain the sample are needed for smaller samples, as attrition may be a crucial element in the saturation criteria; and for larger samples, as rates of researcher turnover may be higher, which can make sustaining the trust of participants more difficult (Dwyer and Patrick 2020).

Finally, flexibility also applies to the protocols and the mode of data collection over time. In the wake of developments in online panel surveys, qualitative research has also turned to online interviewing (Salmons 2015). While this approach has advantages (interviews can be arranged regardless of the participants' location and other scheduling constraints, which can reduce attrition and costs), researchers have warned that it puts at risk the levels of involvement, flow, intimacy, and intensity of the exchanges and the rapport. Specifically, for qualitative research, in which trust between the researchers and the participants is needed to ensure data quality, and non-verbal communication is an important component of the relationship, these risks cannot be overlooked. As well as representing a psychological barrier, using technology implies that technical preparation is needed from both sides to ensure that no problems that could interrupt the communication flow occur. While such limitations are certainly relevant for one-shot studies or for first-wave panels, they are only partially limiting in an ongoing study. If a first contact has already been established and a commitment does not have to be built, web interviews can help to consolidate the research relationship.

4.2 Multiple Perspectives on Time and Change

In prospective qualitative research, the boundaries of the study design and the participants' expressions are less 'closed', and time offers a 'continuously changing point of reference for their analysis' (Blossfeld 1996, p. 182). The analysis of temporal data combined with an interpretative approach may be conducted, very generally speaking, in two ways. Research could be conducted iteratively over each point in time for which data are collected, or it could be conducted using a summative approach that considers all waves together once the study

is over. These modes are not mutually exclusive, but they assume different perspectives on the temporal frames considered in the analyses. Process and change remain central to both procedures, but the iterative approach emphasises variations among points in time, while the summative approach looks at what is produced by their cumulative or blended effect.

In three studies that examined various aspects of the lives of Polish immigrants in the United Kingdom, Ryan et al. (2016) re-interviewed the respondents over intervals of several years, even though there had not been a longitudinal design in the original plan. Having adopted an iterative approach, the researchers reported that after the follow-up interviews, they had to challenge their previous interpretation of the data, as the contingency of their previous accounts and interpretations became clear. McKie et al.'s (2001, 2002) analysis of gender, caring, and work showed that employed mothers manage work and care by living in multiple time horizons simultaneously. They labelled these time horizons 'caringscapes' (McKie et al. 2002, p. 908), thereby paraphrasing Adam's (2000) 'timescapes'. The mothers in their study continuously anticipated contingencies such as child illness, and daily scheduling challenges such as different patterns of school and childcare for each child, while also planning for the long-term changes in the needs of their family over the subsequent months and years. These different types of time horizons provide a framework for the analysis of longitudinal qualitative data that consider temporalities and time.

The extensive volume of data that QLR can capture, as well as the complexity inherent in such data, are disincentives to engaging in larger sample studies that could quickly become difficult to manage and analyse. The challenge is to find a way to scale up from small-scale qualitative enquiries while ensuring that economies of scale are realised, but also that the qualities of small-scale research are not lost.

4.3 Scaling Up

A direct approach QLR scholars have recently used to increase the return of small studies is promoting cross-fertilisation among existing projects. For instance, researchers can bring together several in-depth, small-scale studies to increase the generalisability and the cross-context reliability of the results. One pioneering example of such a collaboration in family sociology is the 'Timescape project', which combines existing data drawn from seven longitudinal datasets to facilitate their collective reuse (Irwin et al. 2012; Irwin and Winterton 2014). However, when teaming up by combining smaller studies, researchers need to have a reliable and standard procedure for archiving data, and a culture of using secondary data for qualitative analyses (Heaton 2008). Qualitative data archives have been actively promoted, particularly in the United Kingdom, since the 1990s, with the aim of encouraging the re-analysis of secondary data (Hughes and Tarrant 2020). Important qualitative research archives exist internationally that are intended to encourage methodological and ethical debates on data reuse, to reduce the underexploitation of collected data, and to encourage comparative research across time and space (Corti 2019). Therefore, secondary data analysis is increasingly possible, and data are increasingly accessible. However, because anonymity is difficult to maintain with rich biographic materials (Thomson 2007) that are updated with follow-up information from subsequent waves, there has been some resistance to such analysis in parts of the research community. In addition, some researchers have argued that not 'being there' makes it hard to interpret the data, and that the context of data production may be under-

estimated. However, this position is not universal, and the secondary use of data is gaining ground in the QLR community (Irwin et al. 2012).

A second and more indirect way to scale up QLR studies is to anchor them in larger population-representative samples, and to combine breadth and depth through a data analysis. In biographical mixed-methods approaches, researchers pick theoretically selected cases belonging to a larger cohort study to compare them and to construct multicase narratives with the aim of better understanding how social structure and individual agency articulate in biographies. A notable example of the use of such an approach from the 1990s in family sociology is the research on the trends in family obligations and responsibilities by Finch and Mason (1993). The study matched representative patterns of kin exchanges with in-depth reflections on their meaning for respondents. A second example is the longitudinal mixed-methods study by Heinz et al. (1998) of young adults in two German cities with different job markets and unemployment rates in the 1990s. Combining the analysis of in-depth interviews (initially 120, and followed over 10 years) and panel data from which the interviews were drawn, they examined the link between the work and family biographies of young adults with vocational education and their planning of career and family transitions. The transnational Child Raising Arrangements project adds a layer of complexity, as it pursued a mixed-methods longitudinal study with matched samples of parents, caregivers, and children across nations. The aim was to situate outcomes concerning education, job performance, health, and emotional well-being in a cultural understanding of the family, of school functioning, and of migration law (Mazzucato 2015).

In mixed-methods approaches, the difference between the case and the variable generalisations over time can lead constructively to a sequential integration of standardised and narrative procedures, and create a dialogue that enriches our understanding of how structure and individual biographical management are linked. Trajectories such as life events sequences and the set of constraints in which they evolve can be described through the statistical analyses of large survey data, while biographical actions and their logic are illustrated by qualitative analyses. There is an increasing awareness of the complementarities between quantitative and qualitative components in longitudinal studies. However, there is still the danger that narrative and constructivist turns in the social sciences on the one hand, and the growing sophistication of holistic and structural equation modelling approaches on the other, will create a sterile divide in empirical studies in family sociology, thus reducing the opportunities for productive collaborative research.

4.4 Ethical Concerns

The development of QLR has been accompanied by a growing debate over the specific ethical problems connected with the high degree of proximity between the researchers and the study participants in repeated interactions. Long-term participation means that at each wave, whether a participant enters, leaves, or re-enters the field must be negotiated. Among the key issues that can arise are consent, intrusion, and study boundaries.

In QLR, consent must be given not just once, but should be a repeated process that starts at the beginning of the study, particularly when dealing with young people whose life perspectives and conditions can evolve rapidly over a short period (Saldana 2003). If participants decide to withdraw, special consideration should be given to whether and, if so, with what limitations the material from previous waves can be used. Confidentiality and anonymity

also acquire more relevance when thinking about the potential impact of the research on participants over time, including the dangers of intrusion, dependency, and the distortion of life experiences through repeated interventions (Thomson et al. 2003). Ethical considerations concerning the researchers involved also increase in importance, as the risk of becoming overly emotionally involved with the fieldwork grows over time (Yates and McLeod 1996). Moreover, the boundaries of when and how to close a study have to be negotiated, particularly when researching children and young people or otherwise potentially vulnerable groups (Crivello 2017; Farrall 2006; Thurman 2015). With repeated interaction opportunities, the need for researchers to offer disclosure and assistance to the participants is likely to increase.

5. CONCLUSIONS

In this chapter, I argued for the complementary and unique value of adopting qualitative longitudinal methods in family sociology research. I limited myself to prospective studies, as this research design is still relatively small. In particular, I highlighted the importance of capturing the subjective perspective of family transitions and relationships, and of considering different temporalities when considering individual agency in family processes. I illustrated this point by presenting a number of QLR studies around family transitions, and showing how they contribute to the literature by exploring at least three areas that are made less visible through other methods: the logics of actions and temporalities underlying family trajectories and related choices; the complex relationship between individuals' priorities and family-related institutions; and the perspectives of hard-to-study populations. Finally, I noted some of the major challenges researchers face in engaging with QLR, such as the very flexible approach to data collection and to the interpretation of results, which also need to account for the multiple and sometimes contradictory perspectives on change. I briefly discussed the possibilities opened up by the establishment of qualitative data archives to do comparative research, and by mixed-methods panel studies to merge the breadth and depth of data collection and analysis. I concluded by noting the specific ethical concerns raised by QLR, such as those related to the repeated and emotionally close interactions between respondents and researchers, as well as the flexible character of their reciprocal engagement. Despite such concerns, QLR is an exciting methodological field that is currently being fully developed, especially as it offers opportunities for digital panels and participatory archive-based research (e.g., Thomson et al. 2018). Family sociology is faced with the challenge of studying increasingly dynamic biographies that result in complex interrelationships among life domains, among related individuals, and within fragmented institutional framings. Understanding the ways in which people experience and interpret their changing life circumstances contributes to our understanding of families as they are being made.

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NOTES

1. Both retrospective and prospective studies can be called longitudinal, as the researcher can reconstruct changes over time. However, retrospective studies are based on reports collected at a given point in time, while prospective studies collect data at subsequent time intervals, thus following change instead of reconstructing it. In the rest of the chapter, I use qualitative longitudinal research to indicate primarily prospective studies.
2. Paul Almond and, subsequently, Michael Apter followed up 14 seven-year-old children of various socio-economic backgrounds in Britain starting in 1964, with the explicit assumption that each child's social class would predetermine his/her future. Almost all have been followed up until their 60s in 2019 (Pearson 2012).
3. From 2000 to 2017, Robert Winston followed the lives of 25 children born at the beginning of the twenty-first century, as they grew from infancy, through childhood and on to becoming young adults (BBC 1 2020). A similar documentary series by Anna Stickland, 'Born to be different', did the same with disabled children (Wyatt 2016).
4. From 2003 to 2016, Julie Gavras followed the transition to adulthood of eight adolescents from the high residential areas in Paris (Rousseau 2018).
5. Other methods consist of analysis of diaries, participant observations, and visual-based research; particularly in children, older people, and community studies (Neale 2020).

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8. Families from a network perspective

Gil Viry and Andreas Herz

1. INTRODUCTION: NETWORK APPROACH IN FAMILY RESEARCH

This chapter is concerned with the network approach (or network perspective) to families. Rather than analysing specific dyads (e.g., parent–child bond), the network approach emphasises that the form and quality of family and intimate relationships – such as the degree of care, support, or conflict they provide – should be related to the larger set of personal relationships; i.e., networks. For example, research on North American families has shown that parents and children are more likely to be supportive in densely-knit family networks with a high proportion of parents and children, because these networks enforce norms of supportiveness and facilitate the coordination of support (Wellman and Frank 2001).

The network approach has been successfully used in the field of family research at least since the seminal work of Elisabeth Bott (1957), and has become more prominent since the 1980s (e.g., Acock and Hurlbert 1990; Johnson and Leslie 1982; Milardo 1988; Wellman and Wortley 1989). We can identify two main strands of the network approach in the literature: the structural and the dyadic approach. The first approach has mainly been used to analyse families at the network level by aggregating information about individual family members and family relationships into meaningful network indices, such as density (degree of interconnection among network members) or homogeneity (their variability in some key characteristics, for example, the proportion of kin) (Milardo 1988; Widmer 2016). This research has been particularly insightful in revealing the diversity and significance of family structures beyond the nuclear family and particular dyads. By contrast, the second strand, which is most prominent in the field of social support, has focused on specific family dyads, especially on marital and parent–child relationships, and more rarely on other types of relationships, such as siblings (Cicirelli 2013) and grandparents (Mueller et al. 2002; Silverstein and Marenco, 2001). Drawing on recent developments in quantitative social network analysis (SNA) (Lazega and Snijders 2015; Vacca 2018; van Duijn et al. 1999; Wellman and Frank 2001), this chapter presents a multilevel analysis of personal networks as a powerful approach to studying family and intimate relationships by simultaneously integrating analysis at the individual, dyadic (tie), and network levels. These developments offer promising ways to combine the strengths of both strands, to extend the scope of family research, and to strengthen the importance of the network approach as an indispensable framework for understanding issues of interest to family studies.

We begin by briefly presenting the key principles of the network approach to families, and provide an overview of the main ways scholars can use SNA to design research and analyse family structures. To illustrate recent developments in the multilevel analysis of personal networks, we use data on the ego-centric family networks of 666 adults living in Switzerland. We conclude by critically discussing some pitfalls of this approach, and by suggesting some avenues for future research.

2. KEY PRINCIPLES OF THE NETWORK APPROACH AND ITS RELEVANCE FOR THE STUDY OF FAMILIES

In this section, we provide a brief overview of the network approach, and discuss the relevance of this framework for conceptualising and analysing families.¹ The network approach encompasses the theoretical views and method(ological) considerations of SNA, which revolve around what Wellman (1988) termed ‘structural analysis’. A social network is formally defined as a specific set of linkages among a defined set of social actors (Mitchell 1969). The core idea of the network approach is that patterns of social relationships – i.e., the size, structure, composition, or geography of social networks – can be used to understand and explain social phenomena, and how social relationships and networks work.

Sociological explanations often seek to explain human behaviour and social phenomena based on the categorical attributes of actors, such as their age, class, gender, and ethnicity. By contrast, the network approach takes *direct and indirect social connections* as the fundamental unit of analysis, and aims to shed light on the structure and patterns of the interconnections between actors, based on the assumption that this structure matters. Emirbayer and Goodwin (1994, p. 1414) called this the ‘anticategorical imperative’. Individual or social attributes are not dismissed, but are framed in relation to different patterns of social relationships. Thus, the ontological position of the network perspective places a strong emphasis on social relationships and the patterns they form. For example, new parents will differ from non-parents not only because of their new parent–child relationships and the new roles these relationships entail, but because they are embedded in a whole set of interrelated relationships that differ in their form and quality. For example, compared with non-parents, parents may become more involved with their parents-in-law or have a higher proportion of friends who also have children. This approach assumes that families are not reducible to the properties of separate relationships (or dyads), but should instead be analysed as network patterns; i.e., as configurations that involve more than two actors. For instance, the quality of the parent–child bond should not be examined in isolation, but rather as embedded in a larger set of family and intimate relationships that include siblings, grandparents, godparents, neighbours, and other people who play important roles in the lives of the parent and the child.

Another key principle of the network approach is that it focuses on *meaningful* relationships between actors, rather than on formal relationships based on institutional definitions or common attributes, such as living in the same household or being related by birth, marriage, or adoption. This principle aligns with some contemporary family approaches associated with *intimacy* and *personal life* (Jamieson 1998; Smart 2007), which emphasise the plurality of family forms and practices of intimacy. These approaches aim to go beyond the conventional assumption that a family consists of a heterosexual couple in a romantic relationship living together with their children (Budgeon and Roseneil 2004) to explore the more fluid character of intimate relationships, which may, for example, include close friends and sexual partners. Because the network approach to families also focuses on what is passing through social relationships, it overlaps and has some affinity with perspectives that emphasise ‘displaying’ (Finch 2007) and ‘doing’ families through a set of practices, such as sharing, loving, confiding, arguing, and caring for others (Morgan 2011). Because it does not a priori assume a fixed definition of what constitutes a family, the network approach can contribute to this broader understanding of family life. It can also add to theoretical and methodological debates about locating its contours by studying the patterns of social and intimate relationships that *matter*

to people in providing affection, care, support, companionship, sense of belonging, and connectedness. Breaking the traditional boundaries of public/private, given/chosen, kin/non-kin, or close/superficial relationships, this approach allows family researchers to apply a greater degree of complexity in mapping and analysing which relationships matter to people; how, when, where, and why these relationships matter; and what the consequences of these relationships are. It is, however, essential that researchers make explicit the theoretical assumptions underpinning notions of what constitutes a *meaningful* relationship. As Crossley (2010) puts it, the patterns of connections never exist independently of the specific content of the interactions, which generate and sustain the relationships that constitute a network. Whatever the degree of standardisation employed by the researchers using quantitative or qualitative SNA, identifying all possible relationships within families requires explicit criteria for the study of these relationships. While some researchers reduce the family to a set of relationships of a particular quality (e.g., degree of intimacy) (Lenz 2009; Lenz and Nestmann 2009), or subsume the family under the concept of personal communities of socially close ties (Pahl and Spencer 2010; Wellman et al. 1988), other researchers use a more subjective definition of the family by asking people to identify their meaningful family members (Widmer 1999, 2016). What all of these network studies have in common is that they focus on the patterning of relationships in seeking to understand family life.

While a central assumption of the network approach is that actions are embedded in social relationships (Granovetter 1985), more recent debates have placed special emphasis on the actors' agency. Criticising the insufficient attention given to the way in which networks are constructed and lived by actors who reflexively operate within them, relational sociology has sought to overcome the dichotomies (such as agency–structure or micro–macro) used by traditional sociological approaches (Emirbayer and Goodwin 1994; Emirbayer and Mische 1998). In contrast to strongly structural and deterministic approaches, this research has stressed the interplay between dynamic social networks and individual actions. While social networks shape the attitudes, decisions, and resources of individual actors; these individuals are, in turn, also agents in the formation and transformation of social networks over time in response to past, present, and imagined future situations. According to these authors, the network approach must pay attention to the subjective meanings (and, thus, to culture) that actors attach to social relationships, stressing the mutual influence of network structures and cultural elements, such as norms, conventions, identities, values, and beliefs. In the field of family research, this involves investigating how people and cultures demarcate family relationships from other types of relationships, such as business or friendship ties. It also involves recognising that family relationships are sedimented and ongoing histories of interaction that shape their meanings and how actors engage with these relationships. In the conceptualisation of agency as a phenomenon to be studied in relationships, there is growing interest in examining how individuals and families engage in network building; and how social networks change, not only in response to life circumstances, but also through the characteristics and purposive actions of culturally embedded individuals.

In SNA, family networks are conceptualised both as (a) predictors and as (b) outcomes depending on the research question addressed. (a) An important area of research has analysed how social networks provide resources (e.g., support) and enforce social norms that may affect individual behaviours and well-being, such as when handling stress, conjugal instability, or parenthood (see, e.g., Bost et al. 2002; Felmlee 2001). Bott's (1957) seminal studies initiated this body of research by showing that the degree of segregation in marital roles varies with the

density of family networks. Studying 20 families in London, she found that closely knit networks provided high levels of mutual assistance and exercised considerable social control over the couples, who tended to adopt traditional family norms and a gendered division of labour between the husband and the wife. These results have recently been confirmed by Giudici and Widmer (2017) using Swiss longitudinal data. (b) In the conceptualisation of networks as outcomes, studies often look at how network characteristics vary across social categories and family forms (widowers, stepfamilies, etc.). The body of research that examines how personal and family networks change in response to major family life events falls into this realm (e.g., Antonucci et al. 2011; Bidart and Lavenu 2005; Kalmijn 2003; Voorpostel 2013), like research that studies how migrants and spatially mobile individuals sustain transnational and multilocal families (Hein et al. 2019; Herz 2015; Lubbers et al. 2010; Molina et al. 2015; Ryan 2011; Viry 2012; Viry et al. 2017).

3. DESIGNING AND ANALYSING FAMILY STRUCTURES THROUGH SOCIAL NETWORK ANALYSIS

SNA studies use different designs that are derived from past developments. While it is beyond the scope of this chapter to present the early developments that led to these designs, it is important to acknowledge the strong qualitative roots of SNA in social anthropology, social psychology, and sociology (see, e.g., Prell 2012 or Scott 2017 for a brief history). The landmark study by Elizabeth Bott (1957) is an example of a qualitative SNA in the realm of family, which is now seen as a source for methodological reflections on qualitative network analysis (Jones 2018). Since the 1980s, most SNA methods have been oriented towards ‘standardised’ designs that analyse social relationships and social structures by quantification, modelling, and visualisations of relational data. Recently, however, mixed-methods and qualitative approaches have been applied more frequently in an effort to better understand the meanings and history of relationships and networks, as well as the mechanisms and dynamics at play (Bellotti 2014; Crossley 2010; Herz et al. 2015; Hollstein, 2011). The recent development in qualitative and mixed-method designs in SNA has been particularly important in research on contemporary families in a transnational context (e.g., Bernardi 2011; Ryan 2011). In the rest of this chapter, we will focus on quantitative SNA methods because of their degree of systematicity. However, some aspects of the SNA research designs and methodological approaches can be applied to qualitative network research.

In quantitative SNA, two main designs can be distinguished. (1) ‘Socio-centric’ networks, also called ‘complete’ or ‘whole’ networks, consist of ties (or edges) between a defined set of actors (nodes), such as friendship ties among all of the employees of a given organisation. In socio-centric network designs, relationships are studied between actors in the given population. (2) ‘Ego-centric’ or personal networks involve ties defined from the perspective of a certain actor (ego) who is connected to other actors (alters) in his/her social environment, and the relationships between these alters. An ego-centric network design can also be used to investigate the friendship ties of the employees of an organisation. Unlike in socio-centric networks, in ego-centric networks, research participants can identify not only their relationships to actors from the set of actors studied (usually members of the organisation), but their relationships to actors outside this context (e.g., friends from other organisations) (Herz 2012). Because ego-centric network designs allow researchers to capture social structures from indi-

vidual respondents, they can be incorporated fairly easily into survey questionnaires to gather information on relationships in families. Thus, ego-centric network designs have a strong advantage over socio-centric designs, in which it is usually necessary to interview all of the actors in the given system.

We can also differentiate network designs depending on whether they are based on relationship information that is collected ‘only’ for the (potential) direct relationships of the respondents, or whether they rely on so-called cognitive social structures (CSS), in which respondents provide information not only about their direct relationships, but about all possible relationships in a system (Krackhardt 1987). For example, a ‘research participant A’ not only provides information about whom s/he is connected to (e.g., B and C), but also about the existing relationships between all others (e.g., between B and C), even though s/he does not have a relationship with them. While this approach was developed using a socio-centric approach, it was translated to ego-centric networks in family research (Widmer 1999). This type of data should be seen as cognitive rather than behavioural, because evidence has shown that participants’ descriptions of their own relationships and the relationships of others differ markedly from observations of these relationships (e.g., Bernard et al. 1979). However, the assumption of CSS methods is that perceptions of relationships do matter (Krackhardt 1987).

Because family research mainly uses ego-centric designs, we concentrate our discussion on the methods of data collection and analysis that employ this approach.² For illustration purposes, we use data on the ego-centric family networks of 666 adults living in Switzerland obtained from the 2013 MosaiCH-ISSP survey using a nationally representative sample. In this survey, participants (egos) were asked about their significant family relationships (alters) and social support.³

3.1 Data Collection

SNA uses a wide range of data collection methods (e.g., direct observation, contact diaries, archives, document analysis). When collecting ego-centric network data through survey questionnaires, three steps are performed (Marsden 2011). In step 1, respondents (egos) are asked, via one or more ‘name generator’ items, to list the reference persons (alters) with whom they have relationships according to one or more criteria (e.g., lending money, providing care, socialising) depending on the research questions addressed. The goal of name generators is to generate a list of names; i.e., to elicit reference persons who are part of the ego’s personal network. The choice, number, and wording of the name generator items need to be carefully considered, because they strongly influence participants’ responses (e.g., Marin and Hampton 2007). Likewise, network measures such as size, density, or composition (e.g., proportion of kin) are often greatly affected by how names are generated. In step 2, respondents answer ‘name interpreter’ questions by providing information on the alters (alter attributes) and the relationships between ego and the alters (ego–alter ties). For example, respondents can be asked about the age, gender, or place of residence of the mentioned alters, and about the duration or quality of the relationship with the alters (e.g., frequency of contact or degree of emotional closeness). In step 3, using a so-called ‘alter–alter matrix’ (or ‘name-interrelaters’), the respondent is asked to qualify the relationships between the alters. While this step is not always applied in studies on ego-centric networks, it is necessary if the researchers want to examine the structure of the network, such as its density or reciprocity (ratio of ties that are mutual). As we mentioned above, in family-related research, an alternative method of inter-

rogating ego–alter and alter–alter relationships (steps 2 and 3) has been developed, which is based on the CSS method from socio-centric networks (Widmer 1999). First, using a name generator, respondents (egos) are prompted to give a list of people (alters). Second, for all relationships – i.e., for all ego–alter relationships and all potential alter–alter relationships – respondents are asked about the type or quality of the relationships (e.g., the level of support or the degree of emotional closeness they provide). The requirements for the survey questionnaire therefore increase, as a ‘complete’ matrix is generated for all relationships.

In the 2013 MosaiCH-ISSP survey, the following name generator was used: ‘Who are the *people you currently consider as important family members?* By important family members, we mean the people who have played a *role*, either *positive* (these people helped or supported you) or *negative* (they annoyed you), over the past 12 months, and who *you consider as being part of your family?*’. In the questionnaire, up to 11 alters could be named. Next, using name interpreters, the respondents were asked about these alters (e.g., age, gender) and the relationships they had with them, including the length of time they have known the alters, and the relationship status between the ego and the alter (e.g., child, partner). In the third step, respondents were asked which alters provided them with emotional support, with material support, influenced them, and annoyed them. They were also asked to provide the same information for all the alters mentioned. This was done by following the CSS approach and eliciting binary responses (yes/no). For measuring material support, the following items were used: (1) ‘Among the family members you listed, who do you think would provide you material support or give you a helping hand when you are facing difficulties, such as financial shortfalls, child care, shopping, transport, housework?’; and (2) ‘Among the family members you listed (including yourself), who do you think, would provide material support to *first person named* or give her/him a helping hand when she/he is facing difficulties, such as financial shortfalls, child care, shopping, transport, housework, etc.?’ and similarly for the second, third, etc. person named. These responses provided information on alter-to-ego support (1) and ego-to-alter and alter-to-alter support (2).

3.2 Levels and Methods of Analysis

A key advantage of the network approach is its ability to analyse families at different (and interrelated) levels of analysis: actor, dyads, and network. Thus, researchers should first clarify whether the study aims to focus at the level of individuals, ego–alter relationships (so-called alter or tie level of analysis), networks (so-called network level of analysis), or multiple levels. At the individual level, for example, researchers can test whether large and cohesive family networks increase individuals’ well-being or are, conversely, burdensome because of the demands involved in sustaining them. At the alter level, network analysts can address research questions such as the following: Are family members using internet-based communication to stay in contact with relatives? Does the interaction frequency influence whether a relationship is supportive? Network-level analysis can be divided into so-called compositional and structural measurements. Among the questions that may be asked at the network level are: ‘What is the proportion of alters who live outside the household?’ (composition); and ‘What is the percentage of people in the family network who support each other?’ (structure). A question at multiple levels of analysis could be whether gender (at the individual or dyadic level) impacts support provision within the network. In the 2013 MosaiCH-ISSP data, 666 respondents reported a total of 4140 relationships, with a mean network size of

7.2 (SD = 3.0; min = 2; max = 12).⁴ An important *alter-level* feature is the status of relationships; meaning the role of the ego–alter relationship. Table 8.1 shows the distribution of the relationship status in eight categories.⁵

Table 8.1 *Distribution of relationship status (alter level, N = 4140)*

	N	%
Child	855	20.6
Partner	510	12.3
Father/mother	584	14.1
Brother/sister	667	16.1
Extended family	750	18.1
In-law	532	12.0
Friend	254	6.1
Other	24	0.6
Total	4140	100

We can see that 20.6 per cent of the individuals identified as important family members (alters) were children, 18.1 per cent were extended family members (e.g., grandparents, aunts, uncles, cousins, siblings' partners, or stepfamily members), and 16.1 per cent were siblings. We can further observe that 12.3 per cent of the important family network members named were partners, 14.1 per cent were fathers or mothers, 12.0 per cent were in-laws (parents-in-law, siblings-in-law, or children-in-law), and about 6 per cent were friends.

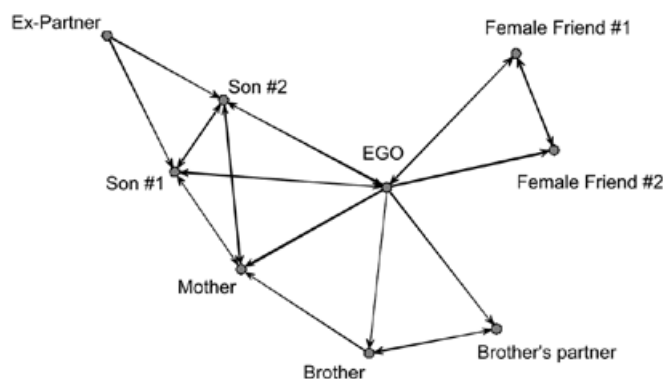
Staying on the alter-level description and turning our attention to the question of social support, we found that respondents reported receiving material support from 75.6 per cent of the alters. In other words, three-quarters of the named family members were perceived as sources of support when the respondent needed help with, for example, a financial shortfall, child care, shopping, transport, or housework.

SNA can also provide a *network-level* description of the network that has compositional and structural dimensions. At this level, we can analyse the networks as cases, and thus have the same number of cases as egos. One of the main features of a network is its *density*. Density is measured as the ratio of existing ties to all possible ties in a network, and ranges from zero (no existing ties) to one (all possible ties exist). There is considerable evidence suggesting that densely connected family networks are beneficial in different life situations. Because densely-knit networks and direct relationships generate mutual support, trust and obligations, effective norms, and information flow, network members can better coordinate their efforts to help others, including in times of need and hardship (Coleman 1988; Milardo 1988; Wellman and Frank 2001). Thus, having dense networks can promote bounded solidarity, the adoption of an exclusive identity, and a strong sense of belonging. However, sparser networks have been shown to provide advantages in other life circumstances. Less dense networks allow for more individual autonomy, the creation of broader identities, the exchange of non-redundant information, and less normative control (Burt 2009; Granovetter 1973; Lin et al. 2001), which can, in turn, facilitate instrumental action (e.g., finding a job), and make it easier for individuals to adapt to new or non-normative situations, such as divorce or coming out as homosexual (Gerstel et al. 1985; Waldner and Magrader 1999). In our illustration using data from the 2013 MosaiCH-ISSP survey, we decided to calculate the density based on the four kinds of relationships measured: emotional support, material support, influence, and annoyance; while

excluding ego–alter relationships.⁶ The mean density of the 666 networks was found to be 0.41 (SD = 0.22; min = 0; max = 1).

As well as performing descriptive analysis, SNA uses graphical representations of networks to uncover the structural patterns of relationships. These network diagrams (also called graphs or sociograms) can help researchers examine the network's layout, clusters of interest, and the positions of the actors (i.e., whether they play central or key roles, such as that of brokers). Network mapping can also help family practitioners identify issues and diagnose impacts. In qualitative SNA, network maps are often used as tools during interviews for visualising research participants' relationships and elicit information on their networks (e.g., underlying stories and meanings).

Figure 8.1 shows the family network of a respondent of the 2013 MosaiCH-ISSP survey. This ego was a divorced woman who was aged 42 at the time of the interview, and who was living with her two sons in a little town in the French-speaking part of Switzerland. She mentioned eight alters as important family members: her two sons and their father (her ex-partner), her mother, her brother and his partner, and two female friends. The direction of the arrow in the graph indicates who is providing emotional support to whom from the perspective of ego. The (arbitrary) position of the nodes on the graph was determined by a network layout algorithm based on node connectivity and aesthetic criteria.



Source: Own representation.

Figure 8.1 *Family network*

In addition to the descriptive analysis and visualisations used to portray relationships and structures in family networks, different modes of *multivariable analysis* can be applied to the network data. However, we should first emphasise the need for a distinction between exploratory (structure-reducing) methods and structure-testing approaches, which include a network feature as an independent or a dependent variable in the statistical model.

Exploratory approaches, such as cluster-analytical approaches, have been widely used in family research to determine the diversity of network patterns. The clusters represent common types of family configurations that are formed by systematically grouping together similar networks based on size, connectivity, spatial dispersion, proportion of kin versus non-kin, etc. For example, using the Family Survey of the German Youth Institute and drawing on Wellman's

(1979) concept of the lost, saved, and liberated community, Diaz-Bone (1997) identified three types of families: ‘disintegrated’, ‘familial integrated’, and ‘modern’ (see also Hennig 2007 for a more recent study using a similar approach). Exploratory approaches on the alter level can be used to show how the status of a relationship (and the respective social role) matches specific types of support (Chua 2013).

In a structure-testing/modelling approach, both alter-level and network-level information can be included in regression analysis. Analytically, whether network characteristics are ‘antecedents or consequences’ (Borgatti and Foster 2003), and are thus independent or dependent variables in the analysis, must be determined. The use of network-level information (e.g., size, density, or composition) is particularly common in family research, as it allows researchers to study differences in family structures. For instance, an important strand of research has examined how different types of social networks affect people’s health and well-being (e.g., Agneessens et al. 2006; Fiori et al. 2006; Litwin 2010; Litwin and Stoeckel 2014; Perry and Pescosolido 2012; Sapin et al. 2016).

3.3 Family Networks as Multilevel Structures: An Example

In this section, we present multilevel models (MLM) as an approach to study ego-centric networks. Family networks can be specified with a two-level model consisting of family relationships (level 1) nested within ego-centric networks (level 2). The aim of this approach is to examine to what extent the presence or values of family relationships between egos (respondents) and their family members vary by the characteristics of the egos, their family members, their family ties, and the structure or composition of their family networks.

While hierarchical MLM are widely applied to nested data structures, and were pioneered for ego-centric networks in the late 1990s (for more details, see de Miguel Luken and Tranmer 2010; Snijders and Bosker 2003; Snijders et al. 1995; van Duijn et al. 1999; Wellman and Frank 2001), their use in family studies remains limited. More commonly, either an alter-level analysis (e.g., analysis of specific relationships, typically between ego and parents or ego and children) or a network-level analysis (e.g., analysis of family structures as causes or consequences of human behaviours) is used separately.

The major advantage of MLM is that these models can simultaneously account for alter-level and network-level variation (Vacca 2018). The idea behind this approach is that the ‘function’ of particular ego–alter dyads can be explained by properties of ego–alter relationships and the structure of the network, as well as by ego attributes. MLM adjust standard errors for the clustering of alters and ties in ego-centric networks, which violates the assumption of independence of observations. In particular, MLM allow researchers to avoid the aggregation of alter-level measures into network-level indices, which may be associated with a loss of information about variation in alter-level responses within networks. MLM can also assess the effects of the network structure and composition, net of the effects of single dyads. A further advantage of MLM is that these models can be specified to allow alter-level parameters to vary across egos or ego-centric networks, and to test cross-level interactions between alter and ego-level variables (e.g., ego–alter homophily). This feature is particularly interesting for family researchers who want to examine family dyads in the context of wider network structures of personal networks.

In the MosaiCH-ISSP data, 4140 alters/ego–alter relationships (level 1) are clustered within the higher-level units of 666 ego-centric networks (level 2). To address the research question

of whether the relational and structural properties of family networks and the characteristics of the egos affect the provision of material support, we used multilevel regression analysis. Because the dependent variable is binary coded, binary logistic regression models are applied in which the unit of analysis is the alter-to-ego relationship, and the dependent variable is whether a given alter provides material support to ego. In each model, the relative chance of an alter-to-ego tie providing support as opposed to not providing support is assessed. Positive coefficients indicate higher probabilities of the provision of material support compared with the reference category; negative coefficients indicate that an alter is less likely to provide material support.

The results of regression models are shown in Table 8.2. Owing to missing values, our analytical sample is reduced to 612 egos/networks and 3912 alters with the inclusion of network density. Model 0 is the empty model with intercept only. Compared with the fit of a single alter-level null binary logistic model (not shown here), Model 0 is a significant improvement (log-likelihood ratio test: $p < 0.001$). In other words, before controlling for covariates, the chance of receiving material support varies significantly from ego to ego, and a multilevel approach is relevant to account for the clustering of alters by ego-centric networks. In Model 1, the relationship status (in eight categories) is added as an alter-level covariate. In Model 2, only ego's gender and age (in four categories) and the network density are included as network-level covariates. Model 3 includes all of the variables included in Models 1 and 2. The results of Model 1 show that ego's partner and parents are more likely to be perceived as providing material support than his/her children, with children set as the reference category. Conversely, members of the extended family are perceived as being less supportive than children. Model 2 shows that respondents aged 18–30 are more likely than respondents aged 31–50 to report that they are being supported by their alters. Respondents are also more likely to perceive that they are being supported by an alter as the density of the networks increased; i.e., as alters are interacting more. The inclusion of both alter-level and network-level characteristics in Model 3 provides a better fit than the previous models, as the reduction of AIC and BIC indices indicates. This model shows that the effect of density remains significant when controlling for relationship status, and vice versa. The provision of material support within families varies both with the status of the relationships and the network density, and both effects are significant. While the relationship status and the respondents' characteristics are key predictors of receiving support, the network approach shows that denser networks facilitate the supportive behaviour of ties and individuals. Family members and family ties are more likely to provide material support in denser networks. The characteristics of both individuals and relationships, and the structure of networks affect the provision of support. When social support studies treat each relationship as a discrete dyad, they thus ignore the structure of the network that may facilitate or impede the supportive behaviour of ties. Likewise, an analysis that focuses solely on the respondent or the network level neglects variation in the kinds of relationships that provide support. The multilevel network analysis allows researchers to take into consideration the interplay between individual characteristics, relational patterns, and network facilitation.

Table 8.2 *Results of multilevel logistic regression. Beta coefficients and standard errors (in brackets). Dependent variable: Alter-to-ego material support (1: support given, 0: no support given)*

	Model 0	Model 1	Model 2	Model 3
Intercept	1.68*** (0.09)	1.77*** (0.14)	-0.68*** (0.20)	-1.04*** (0.26)
Alter-level variables				
Child (ref.)				
Partner		2.04*** (0.23)		2.23*** (0.25)
Father/mother		1.21*** (0.20)		1.20*** (0.20)
Brother/sister		-0.12 (0.16)		0.00 (0.16)
Extended family		-1.36*** (0.15)		-1.22*** (0.15)
In-law		-0.13 (0.16)		0.01 (0.17)
Friend		-0.07 (0.23)		0.26 (0.23)
Other		-0.78 (0.60)		-0.12 (0.63)
Network-level variables				
Ego female			0.10 (0.13)	0.14 (0.15)
Ego age: 18–30			0.40* (0.19)	0.59** (0.22)
Ego age: 31–50 (ref.)				
Ego age: 51–65			0.29 (0.17)	0.52** (0.19)
Ego age: 66–100			-0.04 (0.19)	0.30 (0.22)
Network density (alter–alter ties)			5.61*** (0.41)	6.17*** (0.48)
AIC	4203.37	3827.64	3710.59	3376.09
BIC	4216.03	3884.59	3754.49	3463.90
Log likelihood	-2099.68	-1904.82	-1848.30	-1674.05
Number observations	4,140	4,140	3,912	3,912
Number groups	666	666	612	612
Intercept	2.15	2.89	1.06	1.53

Note: *** $p < 0.001$, ** $p < 0.01$, * $p < 0.05$.

4. CONCLUSION AND OUTLOOK: POTENTIALS AND PITFALLS OF THE NETWORK APPROACH AND RESEARCH AGENDA FOR THE STUDY OF FAMILIES

By its focus on relationships, the network approach has considerable potential in family research. By directing our attention to the connections and their structural patterns, rather than to the characteristics of particular individuals, the network approach offers an alternative way to conceptualise families. It represents a holistic and relational conception of families that can enable academics, practitioners, and clinicians with a wide array of interests in the field to uncover actual – as opposed to assumed – family relationship patterns. This can, in turn, encourage the recognition of a plurality of family forms. It is likely that in societies characterised by globalisation and individualisation processes, studying the networked patterns of family life across time and place will continue to appeal to family scholars. Family research can look back to a long tradition of network studies, such as the so-called ‘Familiensurvey’ of the German Youth Institute (Bertram 1991), or, more recently, the analysis on family networks from the German Family Panel pairfam project (e.g., Lois 2016, but see Brüderl et al. 2013 for interviewer bias in network data collection in pairfam).

Although the network approach offers some clear advantages, it also has potential pitfalls. First, the family and intimate relationships under investigation are only a subset of all of the social relationships within which individuals are embedded. It is, therefore, essential that researchers are explicit in their conceptualisation and operationalisation of network constructs that should be informed and justified by substantive theory. In particular, justifying the establishment of the network boundaries and the measurement of the relationships being studied are fundamental issues that must be addressed when conducting social network research (Laumann et al. 1983). There is a clear need for the development of standardised network measurement procedures, which could facilitate comparisons across studies and replicability. A second challenge in network-based research is that data collection is time-consuming and costly. This issue has become even more pressing because of the complementary strengths to combine contextual information on relationships and networks with network data for effective network analysis. This difficulty may partly explain why there are far fewer panel family surveys that include ego-centric network modules than, for example, national household panel surveys. This gap should encourage family researchers to use innovative data collection strategies, including digital and social media, given that family interactions are increasingly mediated through digital technologies. A third challenge in social network research is ethical dilemmas. The risks associated with asking participants to identify people based on their social relationships require careful consideration in order to protect participants (e.g., Kadushin 2005), and may lead to restrictions on the use of network designs with multiple informants in family settings.

We conclude this chapter by suggesting some directions for future network-based family research. First, while not all network concepts have been widely used in family research, we believe that some concepts, such as multiplexity or transitivity (the ‘friends of my friends are my own friends’ principle), could be particularly valuable to family studies. For example, these concepts may be used to further examine family balance and ambivalence in family relationships (de Bel et al. 2019; Girardin et al. 2018; Widmer and Lüscher 2011). Second, as we highlighted above, the network approach to families mostly uses an ego-centric perspective, while socio-centric approaches are rather scarce. This is surprising, as the development of network methods for socio-centric approaches is very advanced (e.g., Exponential Random Graph Models or Stochastic Actor-Oriented Models, such as SIENA). Thus, the potential for modelling network dynamics in the analysis of family networks is considerable. Even with its rather descriptive and exploratory methods, like its relational (community detection analysis, cluster analysis) or positional (structural equivalence) approaches to socio-centric analysis, SNA offers researchers many avenues for studying family networks. Following the example of Kennedy et al. (2015), developing network designs by including interviews with multiple family members could enable researchers to compare personal networks across family members, and to relate their overlaps/discrepancies to problems of interest to family studies (see, for example, Kalmijn 2003 about the impact of friendship network overlap on couple stability). Third, despite a scarcity of relevant longitudinal data, family researchers could take advantage of a recent trend in network research to examine how major life events are related to changes in family and intimate relationships. Finally, another promising avenue is to study how family relationships and family networks vary with other social contexts, such as the area or country in which individuals live using MLM to examine the effects of welfare states or family policies, for example.

NOTES

1. Whether the network approach constitutes a conceptual framework or merely a set of methodological techniques is a matter of debate among network scholars (see e.g., Mische 2011). While there is no single formal statement of the network approach, there are some basic theoretical presuppositions and core ideas, which provide underlying intellectual unity of what we define here as 'the' network approach.
2. For exceptions, see Kennedy et al. (2015) for an innovative method on combined social networks of couples (so-called duocentric networks) where network data are collected from both partners; or Widmer and La Farga (2000) about a network design including interviews with all the significant family members (alters) of a certain person (ego) on all relationships within the family group, followed by interviews with any person who was cited by at least two alters, using a snowball-sampling technique.
3. For more information about the survey, see <https://forscenter.ch/projects/mosaich/>.
4. This calculation includes ego (the respondent) as part of the network. MosaiCH-ISSP data include a sample of 754 respondents. Among them, 12 respondents did not mention any alter and 76 respondents did not answer the questions about material support.
5. In the questionnaire, the variable had 16 categories and an 'other' category. The recoding into eight categories can be debated. Researchers need to adjust this categorisation according to their research interests.
6. An alternative option would be to calculate the density separately for each kind of tie. For example with material support, a tie from A to B is existing when A provides material support to B. Instead, we assigned tie values ranging from 0 to 4 with 4 indicating that all kinds of ties were existing. Network density was calculated by dividing the sum of tie values by the total number of ties times 4. Ego–alter ties were excluded from calculating the network density, because the density was included as predictor of ego–alter ties in regression models.

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PART IV

FAMILY DIVERSITY AND FAMILY CHANGE

9. A historical perspective on family change in Europe

Josef Ehmer

1. INTRODUCTION

Family sociology, as well as other social sciences, often conceptualises historical and recent family change in a ‘before and after mode’. Current trends are set apart from and contrasted with an ideal-typical past. We find this approach already in the very beginnings of family sociology in the mid-nineteenth century – for instance, in the work of Le Play (1879). In that period, industrialisation and urbanisation were seen as representing the great watershed that separated the past from the present. A hundred years later, modernisation theory and structural-functionalism followed this model, distinguished the ‘modern family’ from previous family forms, and predicted a global convergence towards the nuclear male breadwinner–female housekeeper family, as a result of industrialisation (the classical example is Goode 1963; for discussion see Cherlin 2012, pp. 580–2). More recently, the presumed stability and homogeneity of the ‘modern family’ has served as a starting point for the description of trends towards post-modern diversity in the context of pluralisation, de-institutionalisation, and individualisation (Gerhard 2010). These macro-sociological approaches are powerful concepts for portraying the larger changes in family behaviour. However, they come at a cost. First, they simplify matters by framing the past as a homogenous entity. Second, they emphasise too strongly the break with the past and the ‘novelty’ of the present. A historical perspective provides a more nuanced perspective on family change. It also exposes the limitations of the above-mentioned sociological approaches, which paint with a ‘broad brush’. A historical perspective can take into account various combinations of continuity and change. It can also demonstrate that many developments are non-linear, and that opposing trends may be occurring at the same time.

Systematic research on the history of the family started in the 1960s in the context of ‘new social history’. From its beginnings until today ‘family history’ has been a broad field of inquiry including different research interests, notions of ‘family’, and methods. It was influenced by, as well as critically questioning, approaches from sociology, anthropology, demography, and psychology (Hareven 1991). Family history became a historical sub-discipline of its own with specific scientific networks, conferences, and journals, such as *Journal of Family History* (since 1976) and *The History of the Family* (since 1996). However, the family also remained an object of interest in a wide range of historical studies. Emphasis on the family became part of histories of childhood (Ariés 1962; Cunningham 1995; De Mause 1974), youth (Gillis 1974; Mitterauer 1992), old age (Laslett 1989; Hareven 1996), gender (Davidoff and Hall 2019; Tilly and Scott 1978; Wiesner-Hanks 2006; Wunder 1998), class (Hareven 1982; Maynes 2002; Rudolph 1995; Secombe 1993), and privacy (Ariés and Duby 1987).

Early ‘grand narratives’ followed modernisation theory in two different variants: a social-structural variant argued a close connection between industrial capitalism and the

nuclear family (Goode 1963); while mentality history approaches postulated that sentiment and affection in family relations only occurred with modernity (Shorter 1975). At the same time, in contrast, close-grained analysis at the micro level revealed the existence of nuclear families in pre-industrial societies (Hareven 1991, pp. 100–1) and an intensive emotional family life, for instance, among medieval peasants (Le Roy Ladurie 1981). Within this variety, however, time-specific methodological hegemonies emerged. In the 1960s–1980s, European family history was dominated by quantitative statistical methods, closely connected with historical demography. The family was conceptualised as a household community, the main research interest was in the ‘size and structure’ of families and households across time and space (Laslett and Wall 1972; Wall et al. 1983). Since the 1980s, cultural historical approaches and historical anthropology gained increasing influence, conceptualising the family as a system of kin-based relationships, both within and beyond households. The emphasis shifted towards the complexity of social and emotional interactions between family members, on the dynamics of life course transitions, and on the impact of family norms and discourses (Davidoff and Hall 2019, pp. lii–liii; Hareven 1991, pp. 96–7). These approaches usually rely on qualitative archival sources such as court records, (auto)biographical documents, or – in respect to the twentieth century – on oral history.

From the 1980s onwards, many attempts were published to bind these various strands together in the form of ‘national’ family histories on specific time periods, often with a focus on class-specific developments (e.g., Houlbrook 1984; Rosenbaum 1982; Sieder 1987); and in the form of comprehensive studies on the history of the European family since classical antiquity, or at least since the early modern period (Burguiere et al. 1996; Kertzer and Barbagli 2001, 2002, 2003; Mitterauer and Sieder 1982).

In summary, more than half a century of intensive historical research on the European family has produced a rich spectrum of both empirical evidence and methodological and theoretical reasoning (Fauve-Chamoux and Ochiai 2009; Hareven 1991; Kertzer 1991; Kertzer and Barbagli 2002; Ruggles 2009; Wall 2001). In this chapter, I focus on only a few selected aspects of this research to illustrate the contribution of the historical perspective to family sociology. My aim is to exemplify the usefulness of long-term historical perspectives based on three themes: first, I discuss how the trends towards the homogeneity and the diversity of family forms are interconnected; second, I examine the roots of both the emancipation of women and the limits of gender equality in the history of the European family; and, finally, I explore the historical variations in generational relations. However, the timeframe of this chapter does not stretch up to the present, but from the Middle Ages to the nineteenth and early twentieth centuries only. I do not include the massive changes of family life which began in the last third of the twentieth century, which are widely discussed in other chapters of this volume.

2. THE DIVERSITY OF FAMILY FORMS IN PRE- AND EARLY INDUSTRIAL EUROPE

2.1 Family Forms in Pre-Industrial Europe

Growing diversity is regarded as one of the basic features of contemporary family behaviour (see Liu and Esteve in this volume). It is, however, important to understand that diversity in family behaviour is not a unique feature of the present. Indeed, a long-term historical

perspective reveals that pre-industrial Europe exhibited a rich diversity of family forms, and that trends towards the standardisation and the diversification of family behaviour have long intermingled.

Family history and historical demography have provided substantial evidence of the diversity of family forms in historic Europe. Researchers have taken advantage of the huge amounts of existing data (e.g., from parish priests, community officials, early censuses) to study family diversity as far back as the sixteenth century. As these data were often recorded following a similar logic, they were well suited for drawing comparisons across time and space. Indeed, the organisational principle of such listings relied on a specific definition of the 'family': i.e., that a family consisted of a group of individuals who were residing under one roof and under the authority of one head, and who were connected by kinship and by labour relations, or by labour relations only. The use of this definition led to a reconceptualisation of the family, and a shift in emphasis to focus on the 'household', the 'co-resident domestic group', or the 'family and household as work group and kin group' (Laslett 1983).

Before the Industrial Revolution, European societies were mainly agrarian. Most people were occupied (wholly or partially) with agricultural production. Agricultural production was mainly organised by households and families, who worked in varying degrees for their own subsistence, for feudal rents and taxes, and for markets. Thus, the various modes of agricultural production and the structures of peasant families were key drivers of diversity (Rudolph 1995). Peasant family forms differed depending not only on local economic and ecological conditions and property and ownership relations, but on kinship systems and inheritance rules, which were sometimes – although not always – transmitted within ethnic communities (Farago 1986). Historical family research has created various family typologies, but three household types have been seen as particularly important: the 'simple' or 'nuclear family', which consisted of parents and their children only; the 'extended family', which included one or more additional relatives; and the 'multiple' or 'joint family', which comprised more than one married couple (Wall 2001). These typologies only refer to co-resident domestic groups and differ, therefore, from sociological and anthropological typologies, where 'extended family' usually means a wider kinship network. While these ideal types have proven useful for making quantitative comparisons, they 'may also be misleading, for the reality of family life in the past was much more messy and less rule-driven than such typologies suggest' (Kertzer and Barbagli 2002, p. xxxi).

A large share of households included non-relatives who belonged to the household's labour force. Paying attention to such persons and integrating them into the research design distinguishes the family history of the 1960s–1990s from most former and current family sociology and anthropology. The 'substantial proportion' of non-kin household members was, in the words of Peter Laslett, something like 'a sociological discovery' (Laslett 1972, p. 151). In peasants' households, these non-relatives either lived for longer periods, as, for example, male and female farmhands; or temporarily, as, for example, inmates or lodgers who supplemented the household's workforce in peak times. Similarly, the households of urban master artisans included apprentices and/or journeymen, and middle- and upper-class households also employed live-in domestic servants. Both kin and non-kin household members were interconnected through work in the family economy and through subordination to the head of household, but they differed with respect to their property rights, status, and the length of their affiliation with the household. Non-kin household members represented a very specific and widespread group of wage labourers who were usually single men and women in their youth

and early adulthood, and who are referred to in historiography as ‘life-cycle servants’ (Laslett 1983, pp. 526, 534).

These different types of families and households were very unevenly distributed throughout pre-industrial Europe. For instance, large joint families existed in the eighteenth and nineteenth centuries – and presumably even earlier – in southern Russia, where peasant serfs lived in village communities in which the land was frequently redistributed according to family size. This system supported the co-residence of parents with several married sons (Czap 1983). Family forms in the Baltic provinces were enforced by estate owners, who intervened directly in the composition of peasant households by, for instance, putting together households consisting of peasant couples with married offspring and married servants (Plakans and Wetherell 1992). In the Balkans, complex families were part of a patriarchal kinship system (Mitterauer 1996). In south-western France and in some other European regions there were stem families, consisting of a married couple and one married son – the ideal family form per se in Le Play’s opinion (Fauve-Chamoux and Ochiai 2009). In parts of Italy, multiple families were connected to the *mezzadria* system, whereby land owners leased large farmsteads for a one-year period to large sharecropper families (Kertzer 2002, p. 44). However, there were hardly any multiple families in England, and there were very few multiple families in most parts of France, Spain, Italy, and central and east-central Europe (Wall 2001, pp. 221–4). Extended families with a live-in unmarried or widowed relative (e.g., a parent, a sibling, or a cousin) were more evenly distributed and existed throughout Europe, but their share among all families was below 20 per cent in most regions (Wall 2001, pp. 221–4). However, peasant and craftsmen families that were extended by non-kin life-cycle servants existed in large parts of western, northern, and central Europe. In some periods and areas – such as in the Austrian Alps in the seventeenth to nineteenth centuries or in Vienna in the nineteenth century – these households became remarkably large and complex (Ehmer 1980; Mitterauer 1986).

Nuclear families existed throughout pre-industrial Europe. In some regions, nuclear families were even dominant, particularly in the north-west of the continent, including in parts of Scandinavia, the British Isles, the Netherlands, the north of France, German-speaking regions, and among east-central European Slavic-speaking populations. These small families were typical for rural social groups who owned small plots of land only, such as smallholders, cottagers, rural artisans, or proto-industrial producers in the putting-out system (*Verlagssystem*), or for landless labourers. Among the lasting achievements of family history in the 1960s and 1970s are that the myth of a universal pre-industrial large and multigenerational family was deconstructed, and that the long historical continuity of nuclear family households was revealed.

2.2 A Spatial Dichotomy between the East and the West?

There is an ongoing discussion among scholars about whether the dominance of nuclear families in pre-industrial north-western Europe was unique in the world. This highly influential hypothesis was developed by British sociologist John Hajnal (1965, 1982) in his theory of a ‘European marriage pattern’ and ‘household formation system’, which was characterised, in his view, by a close connection between marriage and the ability to found a new independent household; and, as a consequence, by high rates of lifelong celibacy, older ages at marriage, the neo-local residence of the married couple, and the predominance of nuclear families. It was also argued that in the ‘east European’ or ‘non-European’ pattern, by contrast, marriage was

universal and took place at younger ages, and the married couple was not expected to create a household of their own; instead, they remained in the husband's family, thus forming a joint family (Laslett 1983, p. 526). Hajnal's observation that both the average age at first marriage and the share of lifelong unmarried persons was very high in parts of pre-industrial Europe has been confirmed by a large number of studies, not least by the largest and most comprehensive quantitative project on European demographic history, the 'Princeton Project on the decline of fertility in Europe' (Coale and Watkins 1986).

Nevertheless, many criticisms of Hajnal's theory arose. Some historians were concerned that the idea of an overarching spatial dichotomy of family forms (north-western Europe versus eastern Europe, or, more generally, the 'west' versus the rest) would replace the earlier temporal dichotomy of pre-modern versus modern, which had already been successfully questioned (Ruggles 2009; Szoltysek 2012, 2015).

A growing number of small area studies based not only on statistical evidence, but on qualitative archival records, illustrated that there were substantial variations within both eastern and western Europe (Szoltysek 2015). Anthropologists and sociologists have called attention to the even greater diversity beyond Europe (Goody 1996; most comprehensive to date Therborn 2004). Particularly important was the move 'from a limited view of the family as a static unit at one point in time to an examination of the family as a process over the entire lives of its members' (Hareven 1991, p. 96), and, consequently, a strong interest in the interaction between individual life courses and family cycles. Such fine-grained investigations showed that in regions dominated by nuclear families, individuals might live in extended and sometimes even in joint families, depending on their life course phases (Sabeau 1990, pp. 261–71, 316–20; Kertzer 2002, p. 68). They also cast new light on the distribution of marriage patterns in pre-modern Europe. On the one hand, there were some areas that were characterised by extremely late and limited marriage that were typically found in the west; e.g., on the Atlantic seaboard and in the central European Alps. On the other hand, the lowest ages at marriage were observed in certain areas of the east. However, the marriage behaviour in other regions varied between these extremes across the whole continent (Ehmer 2002, pp. 306–9). The pre- and early industrial European family was characterised by multiple spatial diversity and not by a clear-cut dichotomy between east and west.

2.3 Industrialisation and Family Change

In almost all nineteenth- and twentieth-century theories about the long-term history of the European family, industrialisation and the spread of capitalism appeared as basic forces which paved the way for the predominance of small nuclear households in all social classes, and in all regions that became industrialised. In fact, key factors of social and economic development point in that direction. The agricultural sector, which was the main driver of diversity in pre-industrial Europe, became less important over time, and ultimately stopped shaping social structures. The decline of household-based modes of production and the gradual transition to wage labour as the basic or even sole source of income fundamentally changed the character of the family as an economic unit. However, the assumption that these developments led to an overall decline in the diversity of the European family may be doubted. Rather, the processes of class formation, which were unleashed by the Industrial Revolution, induced the reshaping of class-specific variations.

2.3.1 Middle-class families

Middle- and upper-class attitudes and practices show considerable changes both in respect to the household family and the wider kinship networks. These changes were on their way already in the early modern period and accelerated in the eighteenth and nineteenth centuries. Particularly important – and clearly contradicting prevailing theories – was the strengthening of kin relations (Sabeian and Teuscher 2007). Families who owned property developed strategies to secure their possessions over generations. The family was increasingly regarded as a perennial institution linked to a specific territory, plot of land, or business. While such concepts of the family were particularly salient among the nobility, they also gained acceptance among affluent peasants and mercantile middle classes (Sabeian 1998, pp. 379–96). During the eighteenth and nineteenth centuries, the construction of kinship networks became an important means of class formation for the bourgeoisie, as expressed in the marked increase in endogamous marriages, particularly between cousins. ‘Class differentiation went hand in hand with kin integration’ (Sabeian and Teuscher 2007, p. 22). However, the strengthening of kin bonds was accompanied by the retreat of the individual family household and the emergence of a new domestic ideology that attached a positive meaning to the separation of family from work (Davidoff and Hall 2019). The rise of the bourgeois family was regarded as a cultural and civilising achievement, and was accompanied by the construction of a dichotomy between the private (the family, the home) and the public (the world of work, political affairs). ‘The domestic sphere was initially at least the bourgeois realm *par excellence*’ (Maynes 2002, p. 201).

2.3.2 Working-class families

Working-class families developed differently – despite some parallels. During the early modern period, families of the labouring poor were significantly smaller than those further up the social ladder. British seventeenth-century statistician Gregory King estimated in 1688 that there were only 3¼ persons in the average family in the wage-earning classes, which at that time already accounted for 62 per cent of the English population (Laslett 1984, pp. 31–2). In the industrialised regions of the nineteenth century, working-class families became larger, as people married earlier and had more children. In addition, more children survived due to the decline in infant mortality, and more children remained in the parental home during their youth. These young people were able to contribute to the family income by finding work in the newly emerging industries, and thus no longer relied on taking live-in jobs in peasant or middle-class households. It was also common for working-class families to temporarily take in relatives. British industrial communities in the 1850s had more than double the share of extended families than the average British pre-industrial community (Humphries 2010, p. 76). Moreover, it was common to take in non-kin housemates such as boarders and lodgers in order to generate additional income. Women were frequently working at home in new forms of domestic industry, particularly in shoe and garment production, often with the help of their children – meaning a reintegration of production and paid work into the household (Secombe 1993, pp. 32–40). The result of these trends was that large working-class households were living in small, overcrowded flats. In contrast to the private sphere of the bourgeoisie, these arrangements have been called a ‘half-open’ family structure (Sieder 1987, p. 184).

A completely different situation prevailed far into the second half of the nineteenth century in those areas of central Europe where capitalism proliferated amidst traditional labour relations. In agriculture and in urban crafts and trades, an employer’s household remained the basic economic unit. Economic growth led to an increase in the live-in labour force of

farmhands, apprentices, and journeymen, all of whom were single young men and women. Both the marriage age and the share of life-long unmarried individuals rose as the formation of a working-class family became more difficult than it had been in the past (Ehmer 1991, pp. 16–18). These developments resulted in an enormous increase in ‘illegitimate’ births (Mitterauer 1983).

In the long run, however, working-class families stabilised. Rising living standards, the introduction of the first rudimentary safety nets of the welfare state, the spread of birth control and family planning, and the gradual adoption of the male breadwinner–female housekeeper model (see below) reduced the peculiarities of ‘proletarian’ family life.

To sum up, the early phases of industrial society experienced a clear differentiation between middle class and working-class family patterns. In addition, as industrialisation took place highly unevenly throughout Europe, gaps between forerunners and latecomers widened with respect to both region and class. A certain convergence of family patterns only happened in the twentieth century, albeit not evenly in the whole of the continent, but particularly in western Europe. ‘In the two decades right after World War II ... homogenization and standardization reached its zenith’ (Therborn 2004, p. 314). However, this was a ‘temporary standardisation’ only, which was replaced, in the last third of the century, by what one might call a ‘return to ... historical complexity’ (Therborn 2004, p. 314) – which is, of course, a different kind of complexity than in the past (Cherlin 2012, p. 597).

3. FAMILY AND GENDER: THE CONJUGAL COMMUNITY

Right from its beginnings, family history was closely linked to the history of women and of gender – although, from the 1980s onwards, gender surpassed the family in its attractiveness for historians (Wiesner-Hanks 2006; for an excellent current structured and commented bibliography on gender history which includes all aspects of gendered family life, see the open access website at Cambridge University Press that accompanies Wiesner-Hanks 2019). Research focused on patriarchal concepts and structures, asymmetric power relations, the gendered construction of family roles, and the gendered division of labour. While in a first phase of gender history, the emphasis was on male authority and the oppression of women, in the 1980s the focus switched to the agency and the activities of women, particularly of married wives vis-à-vis their husbands (Fairchilds 2007, p. 3). Two insights are particularly important for family history: Firstly, in spite of the general predominance of patriarchal attitudes there was a rich diversity of women’s positions in the family in pre- and early industrial Europe, mainly due to differences in the family type, in religion, law (particularly in respect to property rights, inheritance systems, and dowry), and in the socio-economic setting of households. To a certain extent this reflects the overall diversity of pre-modern family forms as discussed above. Secondly, the nuclear families of western Europe were characterised by an ambivalence between patriarchal predominance and a strong position of women, both in family ideology and in practice. Many historians and sociologists are convinced that the ‘Western European family was by far the least patriarchal in a very patriarchal world’ (Therborn 2004, p. 297). Therefore, the following section concentrates on gender relations in western-type nuclear families and particularly on the relations between husband and wife.

3.1 Medieval Roots

The historical roots of tight conjugal relations in nuclear family households reach far back into the European past. Michael Mitterauer (2010), in his seminal study on the medieval origins of Europe's 'special path' (*Sonderweg*), locates these families in an agrarian system that first developed in the seventh century in the Frankish Empire, and subsequently spread to England and to east-central and southern Europe (Mitterauer 2010, particularly chapter 3). In this system, peasant families were tied to manorial estates, which allocated plots of land to (free or unfree) peasants, who were, in turn, obliged to provide labour services for the manor. The plot of land they received, called a 'hide', was of a size that could be worked by one simple family household consisting of a married couple and their children, and potentially one or more children of neighbouring peasants who were not needed in their own families, and who worked in other households as farmhands or maids. In medieval sources, a hide was described as a *terra unius familiae* (Mitterauer 2010, p. 58).

The typical peasant family in this system was a work group with the married couple at its centre. Both the husband and the wife were needed to execute all of the tasks, and if one of them died, s/he was frequently replaced by remarriage. Some historians even speak of 'compulsory complementary roles' (Mitterauer and Sieder 1982). In contrast, kinship ties beyond the household played a marginal role, and the male kinship line was not privileged over the female kinship line. All of these features strengthened the autonomy of the married couple and the status of women.

3.2 Early Modern Redefinitions and Rearrangements

In the following centuries, the conjugal unit of the 'working couple' prevailed in a wide range of social groups, particularly among peasants, artisans, and merchants. Married women's work remained crucial to the multiple activities that took place in and around the family household (Wunder 1998; Sarti et al. 2018, pp. 9–15). In the early modern era from the fifteenth to the eighteenth century, however, family life was increasingly influenced by discourses on gender roles and by state regulations which strengthened male patriarchal authority (Hardwick 2006; Cavallo 2010, pp. 15–19). Two factors shaped the intensification of patriarchal power relations in families. Firstly, the implementation of the social and political role of 'household head'. The household was seen as the basic unit of the state and the social order, to be ruled by the husband and father, whom all family members owed obedience. The superiority of the male head and the inferiority of his wife and of all other household members was elaborated in intellectual and religious thought and popularised by a widespread literary genre, the 'books of husbandry' or 'domestic conduct books'. In a British example from 1617, the author recommended that 'good wives' take the following maxim to heart: 'mine husband is my superior, my better; he has authority and rule over me; nature hath given it to him ... God hath given it to him' (Stone 1979, p. 109). On the other hand, rulers and political theorists conceived the state as a family governed by the sovereign, thus using family rhetoric to legitimise political power (Hanley 1989).

The second factor was a revaluation and strict regulation of marriage, particularly in the context of the Reformation, and later by the Catholic Church as well. The main reformers, such as Luther, Zwingli, and Calvin, shared the conviction that the ideal form of life was within the institution of marriage, while the Catholic Church emphasised the character of marriage

as a sacrament. While the voluntary and mutual consent of bride and bridegroom was still regarded as a precondition for marriage, its legal validity now required public and political control and parental consent (Hardwick 2006, pp. 348–52).

The tension between a still strong position of women in the everyday life of families, their weak official and legal position vis-à-vis their husbands, and in society as a whole, gave rise to debates among historians from the 1970s until the present. Debates were fuelled by very rich evidence on these issues in historical sources of all kinds, which allow for diverging interpretations. Initially the early modern period was depicted as a setback for women, whose status was seen as deteriorating. One of the most prominent advocates of this view, British historian Lawrence Stone, wrote that the ‘enhancement of the importance of the conjugal family’ was accompanied by the ‘reinforcement of patriarchy’ (Stone 1979, p. 109). More recent research strives for differentiated lines of reasoning. Despite the severe restrictions imposed on women by patriarchal attitudes and structures, a younger generation of historians put emphasis on women’s – probably widening – room for manoeuvre. From ‘1500 to 1700 the patriarchal paradigm was not only increasingly challenged by intellectuals, both male and female, it was also routinely ignored or subverted by ordinary men and women going about their daily lives’ (Fairschild 2007, p. 3).

Ideas about the ‘inseparability of the roles of husband and wife’ in the conjugal relationship backed this trend (Cavallo 2010, p. 17). As sixteenth-century urban sources put it, husband and wife were expected to ‘work faithfully with each other’ and to secure their ‘sustenance’. This vision also bridged ‘the divide between labour within the workshop and what we might term housework – the labour of cooking, cleaning, and caring for a workshop labour force’ (Roper 1989, p. 40). However, these ideas were contradicted by the spread of a new, more restrictive definition of ‘work’ as occupational activity and gainful employment, partly in the context of an increasing specialisation and professionalisation of work. Although women’s income-generating activities remained essential for middle- and lower-class families, there was a tendency to exclude women from skilled work and from vocational training (Crowston 2008). Thus, work-related gendered hierarchies also expanded (Wunder 1998, chapters 4 and 5). Early modern gender relations in families remained ambivalent and did certainly not develop linearly towards the better or the worse.

3.3 Industrialisation and the ‘Bourgeois Age’

The long-term separation of the family household from paid work was a basic feature of industrialisation. The household became the quintessential venue for (female) unpaid domestic and care work, and for leisure. These developments led to a fundamental redefinition of the relationships within the conjugal community. While the households of peasants, artisans, shopkeepers, and similar social groups kept up traditions of family economy, at least to a certain degree, these family and household forms were no longer the predominant models.

What implications do all of these developments have for the conjugal unit and for gender relations in the family? To answer this question, we have to adopt a work-centred perspective, and to factor in cultural tradition as well as cultural change (Tilly and Scott 1978). The pre-industrial tradition that all housework and childcare were the responsibility of women and not of men continued to be a powerful norm throughout industrialisation and urbanisation.

Among the major changes that occurred at this time were that more value was placed on privacy, and that a new interpretation of the essential differences between men and women

emerged that had started to become entrenched by around 1800 (Davidoff and Hall 2019). The basic idea was that there were natural differences between the two genders, and that these differences should determine men's and women's respective social roles. Men were characterised as energetic, bold, ambitious, intelligent, and capable of reasoning. Therefore, it was assumed that the natural destiny of men was to be active in public life. Women, by contrast, were characterised as weak, devoted, modest, emotional, and intuitive, as well as graceful and beautiful. Thus, it was argued that the natural spheres of women were family and domestic life, love, religion, etc. In her seminal work on this shift, the German historian Karin Hausen explained it as follows:

These character schemata, which did not begin to lose their persuasiveness until the second half of the twentieth century, were 'discovered' in the last third of the eighteenth. During the nineteenth century the underlying principles remained the same and were 'scientifically' supported by medical sciences, anthropology, psychology and psychiatry. At the same time, preconceptions about the essential nature of the sexes were so successfully popularised that ever greater sectors of the population came to accept them as the proper standards of masculinity and femininity well into the twentieth century. (Hausen 1981, pp. 55–7)

The combination of all of the trends presented above led to a rearrangement of gender roles in accordance with the ideal of 'separate spheres' of women and men (for an intensive discussion of ideologies and practices of 'separate spheres' see Davidoff and Hall 2019, pp. xvi–xix, xxx–xxxvii, 149–92). The allocation of housework and care work to married women was now accompanied by their withdrawal from gainful employment. The male breadwinner–female housekeeper model came to be seen as the ideal family form, and, in the course of the nineteenth century, it became the predominant cultural norm. There has been a growing research in family and gender history on the breadwinner–housekeeper model since the 1980s (for an overview see Janssens 1997).

The process by which this model was put into practice was, however, characterised by class-specific variations. It was first implemented by the educated bourgeoisie and in the middle classes in general, who had a strong cultural preference for the new family and gender ideology, as well as the financial means to implement it in their own lives (Davidoff and Hall 2019). The norm that wives should be excluded from gainful employment became particularly rigid in this social group. The educated daughters who gained access to higher education during the second half of the nineteenth century, and who aspired to having an occupational career, usually had to either remain single or forego occupational activities (Kuhn 2000).

In the working classes, this process took a different path. It was initiated in a small segment of highly qualified workmen with good wages and stable jobs; the so-called 'labour aristocracy'. These workers strove to have a solid family life, and they can be seen as forerunners in the working classes for a proletarian adoption or variation of the bourgeois family ideal of a nuclear family living in a neat and clean home with a well-managed household and well-cared-for children (Secombe 1993, pp. 111–24). Among lower earners, the male breadwinner model became established later, and it was always precarious given that the male breadwinner could lose his employment. Nevertheless, the single earner became part of the identity of male workers, and an expression of their masculinity. On the other hand, working-class women gained self-esteem from their ability to manage a proper household and to bring up their children well despite their family's lack of financial means (Secombe 1993, pp. 47–9, 111–24).

Detailed research on working-class families, however, cautions against any harmonising interpretations of working-class breadwinner families. Firstly, this model reinforced women's dependence on male earnings, which had particularly negative consequences for female single-parent families and, generally, for female-headed households. Secondly, during the nineteenth and early twentieth centuries, 'few households could rely entirely on a male breadwinner for their security' (Horrell and Humphries 1997, pp. 9, 63). Therefore, working-class women never completely withdrew from wage labour. Rather, they tended to follow a specific life course pattern that has been called a 'U-curve' by gender historians, whereby a woman usually worked outside of the home while young, reduced her labour force participation after marriage, and tried to stop working completely when the number of her children increased and at least some of them contributed to the family income. When their children were grown up or had left the parental home, women tried to go back to work (Sarti et al. 2018, pp. 13–14; Secombe 1993, pp. 32–4; Tilly and Scott 1978). Moreover, a working-class wife and mother was expected to 'step in' if her husband lost his job. If she did so, she had to find ways to reconcile wage work with her domestic duties – almost in the same manner as women in pre-industrial societies did long before the separation of the private and the public sphere took place.

The rising labour force participation of married women from the middle of the twentieth century onwards, which has often been dominated by part-time rather than full-time employment – albeit with striking differences across European countries – can be regarded as a continuation of this social and cultural tradition. All in all, the ambivalence between male dominance and female agency was present throughout the whole second millennium, albeit in highly variable combinations. Only during the twentieth century did patriarchal power become gradually illegitimate. However, gender inequality and, particularly, an asymmetric gendered division of labour remained, perhaps even more so in families than in society as a whole.

4. CHILDREN, THE ELDERLY, AND GENERATIONAL RELATIONS

4.1 Living Together or Living Apart? Demographic and Social Constraints

The popular view that pre-modern families typically consisted of numerous children and of at least three generations has been refuted by family historians. Decades of research in historical demography on household structures and family attitudes have revealed a much more differentiated picture. In addition to finding that family forms varied, these studies showed that the co-residence of generations was limited by demographic constraints, by norms that governed the life course, and by housing preferences.

4.1.1 Children

In Christian Europe during the medieval and early modern periods, marriage was deemed to be the sole legitimate setting for procreation, and births out of wedlock were rare. The age at first marriage was high in areas where the 'European marriage pattern' prevailed. In some regions, the age at first marriage for women was between 25 and 27, and it was even higher for men. As menopause often started at about age 40, the period during which married women could reasonably expect to bear children was only 12 to 15 years (Flinn 1981, pp. 28–9). In

addition, the intervals between births were long due to the breastfeeding practices in many regions of Europe. Therefore, an average married woman was unlikely to have more than five or six births during her reproductive lifespan. In addition, a considerable proportion of men and women – at times up to 20 per cent – remained single and childless over their whole lives (Ehmer 2011, pp. 22–32).

The number of surviving children per family was considerably lower than the number of children born due to the high rates of infant and child mortality in pre-modern times. On average, roughly one-quarter of infants failed to survive the first year of life, and another quarter died in childhood before they reached their 15th birthday (Flinn 1981, pp. 17, 94). In regions where the joint family system prevailed and the average marriage age was low, the fertility of married women was higher, but infant and child mortality was also higher. Thus, the average marriage would at best produce two and a half to three children who survived to adulthood. Tony Wrigley estimated that 20 per cent of all married couples in pre-industrial Europe had no surviving heirs, and another 20 per cent had only one heir (Wrigley 1978).

As in the case of children, elderly people were not present as frequently in pre-modern households as might be expected. While males and females who survived infancy and childhood had a good chance of reaching old age, mortality rates were high throughout the adult years. Even when some people survived beyond age 60, it was not at all a matter of course for younger people to have living parents or even grandparents. Mortality severely hampered generational relations in families.

Moreover, whether people were or were not expected to live with their families depended on the predominating family type. In the multiple families of southern Russia and a few other regions, we find three and sometimes even four co-residing generations under one roof. Peter Laslett (1989) has found evidence of ‘perennial family groups’ in which young people became parents at very young ages due to early marriage for both men and women, and families stayed together ‘as head gave way to head, normally though not always by the succession of a married son to his late father’ (Laslett 1989, p. 118).

The situation was different in regions where a nuclear family system predominated. In such societies, children were expected to leave home at an early age. In particular, the children of smallholders, cottagers, or labourers who were not needed to contribute to a family economy often left their parents at early ages – typically between age eight and 12 – to work and live in the households of peasants or master artisans, or as domestic servants in middle- or upper-class households. The sons and daughters of affluent families were much more likely to stay home with their parents, often until marriage (Schlumbohm 1994, pp. 341–54, 1996, pp. 86–7). Nevertheless, life-cycle service was common for boys and girls in north-western and central Europe. By contrast, in the patriarchal family systems of southern Europe, it would have been hardly thinkable to release girls from paternal authority before marriage (Kertzer 2002, p. 51).

4.1.2 The elderly

The living arrangements of the elderly were different in urban and rural areas. In early modern cities, a male head of household usually remained in that position for life. In cities like Zurich or Salzburg in the seventeenth and eighteenth centuries, a large majority of the elderly population – up to two-thirds – were not sharing a household with their sons or daughters (Ehmer 1990, p. 175). The households of elderly people were usually small, consisting of two or three individuals: i.e., the household head and his wife, or a widowed man or woman, a servant, and perhaps a lodger. Thus, living with kin was hardly the predominant living arrangement for

elderly people in pre-industrial central European towns. Instead, many urban elderly people were living independently and alone, sometimes until death.

Generational relations in rural communities were different. Property and status were less flexible in the country than in the city, and were much more likely to be connected to a certain piece of land or to a particular farm. For older people living in the countryside, their house and the land they owned were a particularly important resource, which they utilised and/or which they were dependent upon even when they no longer occupied the uppermost position in their household (Ruggles 2009).

This form of generational co-residence relied on the institution of 'retirement', which increased in importance throughout the early modern period in many central European regions. Retirees who were turning over the farming operation to their successors retained free lodging and sustenance for the rest of their lives – or for a specific period of time – on their former property. If a farmhouse was very small, retirees might have been assigned just one corner of a room. But if the farmhouse was larger, retirees might have had their own room, or even an apartment consisting of a chamber and a kitchen. Indeed, very large farms sometimes had a cottage located in the immediate vicinity of the main farmhouse where elderly relatives could live. Thus, three-generational households played a role in pre-industrial Europe, especially in areas where access to land was the main resource for making a living and for obtaining social status. But the general conclusion of researchers who have examined these patterns is that the household economy, rather than the family, was the basic resource for subsistence in old age (Ehmer 2009).

4.2 Intergenerational Relationships

Until the 1970s, studies on the history of family and kinship were dominated by two diverging assumptions regarding their inner emotional climate. Functionalist sociologists claimed that pre-modern families were characterised by deep kinship ties and emotional bonds, which were lost on the way to modernity (Humphries 2010, pp. 48–51). Historians of sentiment, in contrast, developed a reversed version of modernisation theory. They assumed that pre-modern family relations were mainly instrumental and lacked affection between husbands and wives, parents and children, and generally between generations. Affectionate family relations were regarded as an achievement of modernity (Shorter 1975). More recent research has called all such assumptions into question and developed far more nuanced approaches. This concerns, firstly, parent–child relations. Earlier histories of sentiment rooted in modernisation theory assumed that children were first of all valued as part of the family economy's labour force. It was also assumed that the high infant and child mortality rates, as well as the early ages at which young people left home, hampered the development of strong emotional ties between parents and children (De Mause 1974). Meanwhile, improved research has cast a much more friendly light on parent–child relations in pre-modern times (Jarzebowski and Safley 2014). Barbara Hanawalt concluded that already 'by the late Middle Ages, English society became pre-occupied with rearing and educating children and youth so that they could successfully pass into the adult world' (Hanawalt 1993, p. 6). This revision is based on two strands of evidence: one on discourses and one on ego-documents, such as diaries, letters, and autobiographical writings. These sources reveal a long-term trend towards people paying increasing attention to and having a greater appreciation for children (Cunningham 1995). Humanists of the fifteenth and sixteenth centuries showed a strong interest in children, and encouraged parents to behave

tenderly and affectionately towards their children, and to raise them without resorting to physical punishment. This trend was further strengthened during the Enlightenment. Among eighteenth- and nineteenth-century bourgeois families, children had assumed a central position (Bailey 2012). Childrearing became regarded as primarily the function of the mother, but the father was also expected to contribute to his children's education, albeit to a lesser degree due to his role as the breadwinner.

In practice, of course, there were numerous exceptions to these trends, and childhood in pre-modern Europe must not be idealised. Children who laboured in the family economy or participated in their family's wage labour, be it in agriculture, in service, or in factories, often suffered from overexertion and rigid discipline, and the authority of their masters was often abusive. Poor and orphaned children were forced to work in orphanages at very young ages, or were apprenticed by 'poor law' authorities to workshops or farms (Humphries 2010). During the fourteenth to sixteenth centuries trade with child slaves from eastern Europe or Africa was common in Mediterranean Europe, due to a demand for young domestic workers (Beattie 2010, pp. 58–61).

Secondly, the relationship between children and their aged parents was also more nuanced than is widely assumed. Findings pointing to the scant presence of three-generational families and the preference for independence may suggest that the levels of interaction between married couples and their aged parents were low. However, recent research on generational relations in eighteenth-century England found evidence of 'reciprocal ties between the generations [which] led to close bonds of affection and clear sense of responsibility', both in families in which the generations co-resided, and in families in which the adult children and parents lived in separate households (Ottoway 2004, pp. 142, 147). Elderly parents who were living independently assisted their adult children when needed, and vice versa. Children who had already left their parental home often returned in case of need or illness, or when their parents needed help. Married children sometimes took in their elderly parents when they became reliant on care. Thus, evidence that there were strong emotional ties among the generations has been found for all social classes, although it appears that poor people had much more modest material means to put these bonds into practice than those on the higher strata.

Both the growing esteem for children and the nurturing of affectionate relationships with the elderly paved the way to the emergence – or 'invention', as some historians call it – of new social roles: namely, of grandmother and grandfather (see Skopek in this volume). Before the eighteenth century, these terms were used rather seldom; the sources speak instead of an 'old father' or an 'old mother' (Göckenjan 2000, pp. 199–212). While many children had no living grandparents, a majority of people over age 60 could expect to have at least one living grandchild. While parenthood came with responsibilities for providing children with necessities and education, grandparents' relationships with their grandchildren could be based to a much greater extent on cultivating emotional ties. Nevertheless, these relationships also included providing mutual help and care when needed (Bailey 2012, pp. 200–10; Ottoway 2004, pp. 155–65). It is not entirely clear to what extent the picture of positive and intense generational relations, as it has been painted in recent historical research on the family, childhood, and old age, spanned the various social, economic, and cultural groups of pre-modern European societies, both in terms of norms and practices. However, as a set of role models, these enhanced generational relations certainly existed.

5. CONCLUSION

The history of the European family is not only a history of change. As the three thematic fields presented above show, there were also substantial – and perhaps surprising – continuities. These continuities include the long-lasting tradition of the nuclear family with a married couple at its centre, which has been dominant since medieval times in parts of Europe and in specific social groups; the conjugal unit of husband and wife with a high degree of autonomy and independence from their wider kinship networks, including from their parents and ancestors; married women with a strong position in the household and in the family in varying combinations depending on the degree of patriarchal dominance; a gendered division of labour in which women participated in a wide range of economic activities within and outside their household, while also having the sole responsibility for housework and care work; and the existence of emotional ties between generations within and beyond the co-resident group, which included feelings of responsibility and a desire to provide mutual help. It is, of course, possible to write a history of the European family as a history of suppression, violence, and bitter conflict. But in this chapter, I focused instead on those long-lasting traditions that promote equal and relaxed family relations, and thus support both solidarity and individual autonomy.

However, pointing out that there are long-running continuities and social traditions is not meant to suppress awareness of the fundamental transformations European societies underwent throughout the second millennium in all dimensions of economic, social, cultural, and political life; not least in the legal order. Families were embedded in these transformations, suffering from as well as shaping and forming social change. In this chapter, I concentrated on the long-term developments in pre-industrial Europe and on the transformation from an agrarian to an industrial society. My aim was to shed light on the rearrangements of family structures and the redefinitions of gender and generational relations in which established norms and patterns were not simply abolished, but adapted to overcome new challenges. For example, in the early industrial age, kinship bonds were revived by bourgeois families, working-class households were enlarged, and the numbers of life-cycle servants in the households of peasants and artisans rose. But there were certainly new elements as well, such as the separation of the domestic sphere, the emergence of the ideology of the natural character of the sexes, and the spread of the male breadwinner model in all social classes.

The nineteenth century, in particular, was characterised by various mixtures of tradition and innovation in all aspects of family life. However, from a long-term historical view, the history of the European family in general does not so much appear as a series of radical breaks, but as an evolutionary process characterised by the continuous recombination of old and new elements.

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10. Demography of family change in Europe

Tomáš Sobotka and Caroline Berghammer

1. INTRODUCTION

On 22 May 2015, the ‘Marriage Equality Referendum’ in Ireland showed clear support for the recognition of marriage as a contract between two individuals irrespective of their sex, with 62 per cent of votes in favour of the constitutional amendment. This result, together with the outcome of a 2018 referendum that overturned the ban on abortion in Ireland, marked an extraordinary shift in family behaviours and attitudes in that country in recent decades. In Ireland of the early 1970s, divorce, contraception, and abortion were still banned; married women were not allowed to work in the public sector; and state family policy was guided by Catholic social teaching (Canavan 2012; Laplante et al. 2020). At that time, the period total fertility rate (TFR) in the country was close to four births per woman, and fewer than 3 per cent of children were born outside of marriage. Today in Ireland, the period TFR is below 1.8, and close to four out of 10 (38 per cent in 2018) children are born outside of marriage. While the sweeping family-related changes in Ireland arguably represent a more radical break with the past than the shifts that occurred in other countries in Europe (Laplante et al. 2020), they also reflect a broader, continent-wide trend towards lower fertility, less marriage, and more diverse families and living arrangements.

The basic contours of this transformation are well known, and have been repeatedly discussed (e.g., Sobotka and Toulemon 2008). Many studies on family change rely on a small set of indicators that are analysed for selected countries. Our aim is to provide a broad-brush picture of the shifts in family behaviour across Europe during the last half a century, drawing upon diverse datasets and publications. We aim to cover all parts of Europe, and to examine a relatively long period between 1960 and 2018. We complement the analysis of period changes with a cohort view of the transformation of marriage, reproduction, and divorce, especially among women born since the 1940s. We pay special attention to the ongoing shift towards later union formation, marriage, and reproduction; and we show that key family transitions are increasingly taking place among women in their 30s.

Our chapter covers three broad topics: a) trends in union formation, marriage, living arrangements, and divorce; b) period and cohort fertility, including family size distribution and childlessness; and c) the family context of reproduction and parenthood, including non-marital childbearing and single motherhood. We also briefly discuss other important family developments, including less conventional family forms – such as non-residential relationships and same-sex unions – multiple-partner fertility, and social stratification in family behaviour. We cover these trends only briefly, with a more detailed discussion, additional figures, and an expanded reference list provided in a forthcoming working paper (Sobotka 2021). While most of our analysis pertains to women, we also comment on the changes in marriage behaviour and living arrangements among men. Our bird’s-eye review also contributes to the long-standing discussions on the convergence (or its absence) in European family trends across countries and regions.

2. BACKGROUND: KEY FRAMEWORKS AND CONCEPTS EXPLAINING FAMILY CHANGE OVER TIME

The recent shifts in family and fertility behaviour have been explained from different theoretical angles. We highlight the key concepts and explanatory frameworks, most of which are focused on macro-level changes in the family that have been observed in Europe over the last 50 years. These concepts often complement each other, and, when combined, provide a broader and more nuanced view of the multifaceted drivers and complex dynamics of recent family changes than any single theoretical approach could.

The second demographic transition (SDT) framework is intricately linked to the family trends of the last half a century that are analysed here. It sees the changes in fertility, nuptiality, and living arrangements as part of a unique transition driven by broader cultural and ideational changes (Lesthaeghe 2010). The SDT framework predicts that the shifts towards ‘less family’, delayed family transitions, and diverse life courses are irreversible, and will eventually spread to all societies that have completed the first demographic transition and attained relatively low fertility and mortality rates. An alternative perspective on family instability is provided by concepts that attribute the erosion of marriage and the shift towards unstable living arrangements to women and men with limited opportunities and resources. According to this view, family instability is rooted in economic and structural disadvantages, and tends to lead to widening social status disparities in family behaviour and resources (McLanahan 2004; Perelli-Harris et al. 2010). A related strand of theories accentuates the society-wide impact of economic uncertainty. These concepts have become increasingly prominent since the onset of the Great Recession in 2007–2008, especially in the context of Southern Europe (e.g., Adsera 2017). In recent decades, labour market risks have grown as globalisation and technological change progressed. When confronted with declining relative income, rising uncertainty, and unstable forms of employment, young adults are avoiding long-lasting, highly committed relationships. This response has, in turn, been driving the shift to later family formation and less stable family forms in Western societies since the 1980s (Mills and Blossfeld 2013). Economic conditions also play a key role in the arguments linking economic and social development (as measured by the Human Development Index and gross domestic product per capita) with fertility, which predict an upturn in fertility in societies that surpass a certain threshold of development (Luci-Greulich and Thévenon 2014; Myrskylä et al. 2009).

The ideational and economic arguments on family change have often neglected the role of the massive transformation in women’s lives in the last half-century, in which women have been overtaking men in university graduation rates, becoming economically independent, and pursuing life-long employment as an expected part of their life course (Goldin 2006). The ‘gender revolution’ (GR) framework posits that the transformation in women’s lives is primarily responsible for the ongoing changes in the family. Building upon earlier arguments by McDonald (2000), the key contributions in the GR debate (e.g., Esping-Andersen and Billari 2015; Goldscheider et al. 2015) argue that the trend towards ‘less family’ observed in the last three decades of the twentieth century was caused by the incompatibility between women’s rising labour force participation and women’s family roles. These two studies predict that when family roles become more gender-equal, a return to ‘more family’ will follow; i.e., fertility and marriage rates will rise and divorce rates will decline, especially among highly educated women. Thus, these scholars anticipate that as gender egalitarianism progresses,

marriage and fertility rates will first decline, and then increase (following a U-shaped trend); while divorce rates will first rise, and then decline.

Family trends are also affected by technological changes (including advances in assisted reproduction), legal regulations, and policies. European countries apply a wide variety of family-related policies aimed at supporting families. These policies implicitly or explicitly encourage childbearing, mainly by helping parents combine their employment and family lives (OECD 2011; Sobotka et al. 2019; Thévenon and Gauthier 2011). Policy changes often respond to behavioural and attitudinal changes in societies, and shape them in turn. For instance, the rise in non-marital births alerted lawmakers to the need to regulate the rights of parents and children in non-marital unions (Perelli-Harris and Gassen 2012). The extent to which same-sex marriage is legally recognised varies across Europe. As of 2019, 16 of the 28 European Union (EU) members legally recognise same-sex marriage, while seven EU countries (all in Central and Eastern Europe) define marriage as a union solely between a man and a woman (the remaining countries have laws that partially recognise same-sex marriage). Divorce laws have also become more liberal in recent decades. Malta was the last EU country to grant the right to divorce, in 2011. Assisted reproductive technology (ART) is another broad area of family behaviour that is highly regulated. These legal regulations affect every aspect of ART, and lead to wide differences across countries in the rates of use, cost, and accessibility of these treatments, as well as in the types of treatments that are available (Präg and Mills 2017; see also Passet-Wittig and Bujard in this volume).

3. DATA, INDICATORS, METHODS, REGIONAL GROUPING

To map changes in family behaviour across countries and broader regions in Europe, as well as across cohorts and over long periods of time, we rely on a broad collection of data provided through vital statistics, population registers, and census and survey data. Here, we are unable to provide details of all the data sources used, and instead list only the key resources next to the figures and in the text.

We analyse period indicators that are often affected by the trends in the timing and the spacing of demographic events, as well as cohort indicators that reflect the ultimate intensity of a given behaviour across the life courses of the women and men born in a given year. Depending on data availability, we look at family changes since the 1960s, and focus in more detail on the developments since 1990, following the fall of the Berlin Wall and the breakdown of the state-socialist political systems in Central and Eastern Europe. Our cohort indicators cover family trends among women and men born from the 1930s to the 1970s, paying special attention to the family behaviour of the cohorts born in the 1970s.

We use the indicators readily provided by statistical agencies (especially Eurostat 2020), research studies, data collections, and data repositories (e.g., CFE Database 2020; Council of Europe 2006; Human Fertility Database 2020; VID 2020); as well as indicators we computed on the basis of available data (e.g., indicators on divorce rates). Most of the indicators we analyse are conventional indicators that are widely used. Some of our indicators cover almost all countries in Europe; however, we are unable to analyse and discuss trends in each country (see Sobotka 2021 for more detailed analyses by country). Therefore, we group countries into broader regions, and focus our discussion on trends in these broader regions (data are weighted by the population size of the countries in each region). In cases in which our data cover fewer

countries, we focus our analysis on larger countries, specific cases, and countries that are representative of broader regions. Our regional analysis is based on data for 33 European countries grouped into seven broader regions:

- *Nordic countries* (Denmark, Finland, Iceland, Norway, Sweden);
- *Western Europe* (Belgium, France, Ireland, Luxembourg, Netherlands, United Kingdom);
- (predominantly) *German-speaking countries* (Austria, Germany, Switzerland);
- *Southern Europe* (Greece, Italy, Portugal, Spain);
- *Central Europe* (Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia);
- *South-Eastern Europe* (Bulgaria, Romania, Serbia); and
- *Eastern Europe* (Belarus, Russia, Ukraine).

The last three regions include the countries that had authoritarian state-socialist political and economic systems until 1989. We do not include some smaller countries and territories with populations below 1 million, or countries that have lower quality population data or gaps in the data, mainly due to conflicts and territorial changes in the 1990s–2010s (e.g., Albania, Bosnia and Herzegovina, Kosovo, and North Macedonia, but also Moldova). As data are missing for certain years for south-eastern European countries, some charts do not display indicators for that region.

4. UNION FORMATION, MARRIAGE, AND DIVORCE

4.1 Union Formation: The Continuing Rise and Higher Stability of Cohabitation

In recent decades, the process of partnership formation has shifted away from the traditional sequence, in which marriage was followed by the newlyweds moving in together, and, later, by the birth of the couple's first child. Cohabitation has evolved from being a relatively marginal living arrangement among those born before 1940 to being the new standard way of entering a first union. Indeed, cohabitation has even become normatively expected. Among women and men born in the 1970s, the share of all first unions that started through cohabitation rather than via direct marriage was highest in Western and Northern Europe, where it reached between 79 per cent (Germany) and 92 per cent (France) (Hiekel 2014). While cohabitation remains less common in most countries of Central, South-Eastern, and Eastern Europe – especially in Lithuania and Romania – it has increased markedly in each of the 14 countries analysed by Hiekel (2014) (Table 10.1). More recently, cohabitation has also spread rapidly in Southern Europe, especially in Spain, where it remained rather marginal until the 1990s (Dominguez-Folgueras and Castro-Martín 2013).

In the past, cohabitation was typically a short and unstable living arrangement that was in most cases either dissolved or converted into marriage within two–three years. In the early 1990s, the median duration of cohabitation was 2.4 years in 11 highly developed countries (Heuveline and Timberlake 2004). Today, cohabiting couples convert cohabitation into marriage or dissolve cohabiting unions at a slower pace than they did in the past. Among the cohorts born in the 1970s in Austria, Belgium, France, the Netherlands, and Norway, cohabiting unions lasted three–four years on average (Hiekel 2014).

Table 10.1 *Proportion of first co-residential unions that started as unmarried cohabitation, by birth cohort (in per cent)*

	Year of birth (women and men combined)				
	1920–40	1941–50	1951–60	1961–70	1971–80
<i>Nordic countries, Western Europe, and German-speaking countries</i>					
Austria				79	87
Belgium	32	35	46	63	80
France	13	28	54	83	92
Germany	23	36	55	72	79
Netherlands		14	41	70	85
Norway	15	33	65	86	89
<i>Central Europe, South-Eastern and Eastern Europe</i>					
Bulgaria	22	40	49	56	69
Estonia	26	36	49	64	88
Georgia	32	38	40	53	63
Hungary	3	5	13	29	60
Lithuania	7	10	16	21	44
Romania	9	12	17	21	32
Russia	23	24	25	35	54

Note: The data are available for a limited number of countries analysed by Hiekel (2014); therefore, we grouped them into broader regional groupings than those defined in Section 3.

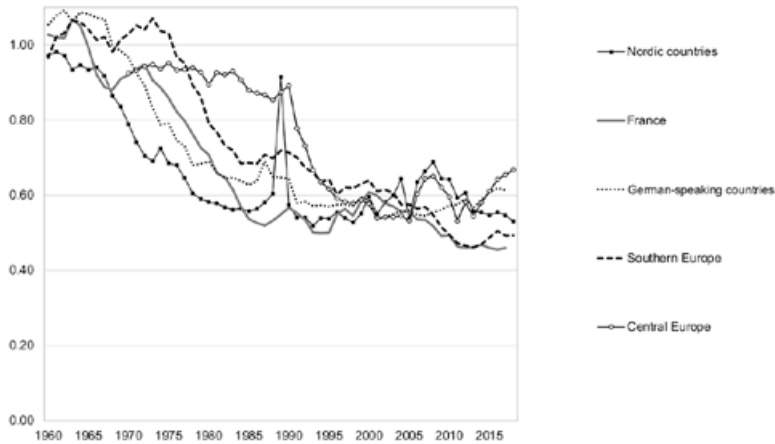
Source: Hiekel (2014; based on “Generations and Gender Surveys” 2004–2009 and for the Netherlands on “Onderzoek Gezinsvorming”).

Many people continue to perceive marriage as reflecting a higher level of commitment, and cohabitation as allowing for more freedom. Thus, cohabitation is often seen as an arrangement that provides the partners with an opportunity to test their relationship (Perelli-Harris et al. 2014), or to avoid the costs of marriage and the potential costs of divorce. Cohabiting couples can be broadly divided into two groups: those who perceive cohabitation as a stage in the marriage process, and those who regard it as an alternative to marriage (Hiekel et al. 2014). Over time, the actual behaviour of cohabiting couples suggests that cohabitating unions are becoming more permanent and often involve childbearing, and are thus becoming similar to marriage. Evidence that this is the case has been found for Bulgaria, France, Italy, Norway, and the United States (Di Giulio et al. 2019).

4.2 Marriage, Marital Dissolution, and More Diverse Living Arrangements: Has the Decline of Marriage Come to an End?

Between the late 1960s and the mid-1990s, all European regions experienced a sharp fall in first marriage rates, starting in the Nordic countries and Western Europe (including in the three German-speaking countries), and followed by Southern Europe in the late 1970s and the early 1980s and Central and Eastern Europe in the 1990s (Figure 10.1).

The onset of the decline in marriage rates also marked the beginning of a long-term trend towards delayed marriage, which has continued without interruption in an almost linear fashion. As a result, marriage has by and large disappeared from the lives of young adults during the last decades. In most countries of Western, Northern, and Southern Europe, the mean age at first marriage for women is now 30–33 years, up from 22–23 years in 1970. While this shift in the mean age at first marriage did not start until the 1990s in Central, Eastern, and



Note: Recent data on total first marriage rate are unavailable for most countries in Western Europe, therefore, we only show trends for France instead of the whole region.

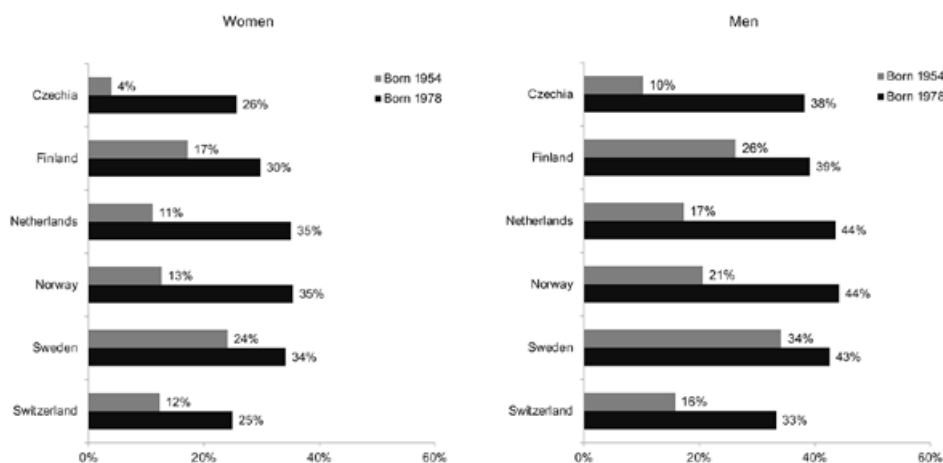
Source: Own computations from Council of Europe (2006), Eurostat (2020), and national statistical office data.

Figure 10.1 Total first marriage rate in selected regions of Europe, 1960–2018

South-Eastern Europe, it proceeded with a similar intensity, and is now around 28 for women. Among men in these regions, the mean age at first marriage has increased at a similar pace, and is now about two years higher than it is among women (own computations from Eurostat 2020).

Period trends in marriage have been strongly affected by the ongoing postponement of first marriage and family formation. Therefore, period marriage indicators do not fully reflect the shifts in the underlying marriage intensity or the share of women who will eventually marry. Nevertheless, the broad decline in marriage rates in the past 50 years illustrates well the extent and universality of the retreat from marriage across all parts of Europe. By the turn of the century, period marriage rates converged to similarly low levels across Europe, with the period total first marriage rate among women hovering around 0.6. Since that time, marriage trends have displayed ups and downs, partly driven by trends in first marriage timing, but these fluctuations were relatively small compared with the sharp downturn in the previous decades. In Southern Europe and some countries in Western Europe, including France, first marriage rates decreased further; whereas in the Nordic countries and in Central and Eastern Europe, they underwent a modest recovery in the 2000s, before resuming a renewed downward trend in the Nordic countries during the last decade. More recently, first marriage rates increased somewhat in the German-speaking countries and in Central and Southern Europe around 2015, in tandem with the recovery after the economic recession ended around 2013. At present, many countries in Southern, Western, and Northern Europe have total first marriage rates at or below 0.5, or at about half the level in the era of almost universal marriage in the 1960s. Marriage trends are also affected by changes in marriage-related legislation that may stimulate short-term ups and downs in marriage rates. For example, in Sweden in 1989, there was a short-lived marriage boom linked to the abolition of the state pension for widows starting in 1990 (Ohlsson-Wijk 2011). This effect can be seen in Figure 10.1 as a temporary upturn in marriage rates for the whole Nordic region.

Are most women and men simply delaying marriage and marrying later, or has there been a sharp increase in the share of people who never marry? The trends in the cohort indicators of the share of women and men who never marry confirm that marriage has become less common not only at younger ages, but across the life span. The share of young adults who marry before age 25 has collapsed across Europe. Among women born in the early 1990s, only 11 per cent (France, Norway) to 17 per cent (Switzerland) married before reaching that age, down from about 60–90 per cent of those born in the late 1950s. The share of women who married before age 30 has fallen to about 40 per cent in most countries. However, non-marriage has also become much more common later in life. By age 40, which is generally seen as the normative age deadline for parenthood (Billari et al. 2010), more than one-third of women and 43–44 per cent of men in the Netherlands, Norway, and Sweden have never married. In the last 25 years, the share of never-married women and men has risen sharply in all parts of Europe (Figure 10.2).



Note: The selection of countries was affected by data availability: these data were computed from the statistics on the distribution of women and men by calendar year, age, and marital status, which are not available for most European countries in the Eurostat database for the two cohorts and both sexes analysed.

Source: Own computations from Eurostat (2020).

Figure 10.2 *Share of women and men who never married by age 40, selected European countries*

This overall trend towards a higher share of women and men never marrying proceeds unevenly across social groups. Research on marriage has emphasised its economic underpinnings: marriage is increasingly seen as a marker of stability and achievement, and is perceived as a ‘luxury good, a step to be taken after one has achieved a comfortable level of economic stability’ (Smock and Schwartz 2020, p. 12). Consequently, marriage rates are eroding faster among women and men with lower socio-economic status, especially in the more gender-equal countries (Kalmijn 2013). However, Perelli-Harris and Lyons-Amos (2016) showed that in all social groups in Europe, marriage has been increasingly postponed or foregone.

What has replaced marriage? In addition to cohabitation with or without children, non-residential partnerships and other living arrangements have become increasingly prevalent.¹ Non-residential partnerships – couples ‘living apart together’ (LAT) – are often perceived as temporary (Ayuso 2019), and, due to their fluidity, they are harder to define and measure than residential partnerships.² Many LAT couples report that they do not live together due to practical barriers, especially work-related constraints or not being able to find affordable housing (Liefbroer et al. 2015). In European countries, the estimated share of LAT relationships among all couples ranges from 1 per cent in Estonia to close to 10 per cent in Belgium and Norway (Pasteels et al. 2017). LAT relationships are also increasingly common in middle and later life course stages, including among divorcees (Régnier-Loilier et al. 2009).

In addition, three kinds of living arrangements not involving co-residence with children or with a partner have become increasingly prevalent, especially below age 30. First, living with parents has become more common among young adults (Eurostat 2019a), mainly because young people are spending more time in education and are delaying economic independence. Often, they are having trouble finding affordable housing. At the same time, huge regional divides in the age at which young adults leave home persist in Europe, with the median age being relatively low in the Nordic countries, and very high in Southern, Central, and South-Eastern Europe.³ Second, single living has become more common, especially in countries that provide subsidised housing, which facilitates early home leaving and residential independence, such as in the Nordic countries, the Netherlands, and Austria. Across the EU countries, single living has been relatively stable among young adults, but it has increased at ages 35–50, with the share of people who live alone rising by two–three percentage points between 2006 and 2016 (Liu and Esteve 2020, data based on EU Labour Force Survey). Third, the trend towards sharing a flat with roommates has likely been rising as well, although empirical studies of this phenomenon in Europe are surprisingly rare.⁴

Same-sex couples have increased in prominence and visibility. Same-sex partnerships represent a small minority of all partnerships, typically accounting for up to 2 per cent of all residential unions (Valfort 2017, see also Evertsson et al. in this volume). This figure broadly corresponds to the reported proportion of adults who self-identify as lesbian or gay, reaching 0.7 per cent to 2.5 per cent in several surveys for North America, Australia, and Canada reviewed by Valfort (2017, p. 28, figure 10.2). This share might be higher among the newly registered partnerships and marriages. In France, same-sex marriages accounted for 3.1 per cent of newly married couples in 2017, and for 3.8 per cent of newly registered civil unions (PACS), with male and female couples being equally represented among the marriages and male couples making up a larger share of the registered unions (Breton et al. 2019, table 14). Population-level data on the lesbian, gay, and bisexual population remain relatively limited, and suffer from differences in definitions and measurement errors. Past research, summarised by Valfort (2017), has indicated that same-sex cohabiting unions are much less stable than the unions of different-sex couples. In addition, same-sex couples are more likely than different-sex couples to be childless, and those who are not often have children from a previous heterosexual union. European countries continue to differ in their levels of acceptance of homosexuality and legal recognition of same-sex unions. For example, none of the countries in Central, Eastern, and South-Eastern Europe has legalised same-sex marriage and only three (Czechia, Estonia, and Slovenia) recognise same-sex civil unions. Moreover, except in Czechia and Slovakia, the majority of young adults in these countries oppose same-sex marriage (Pew Research Centre 2018).

Table 10.2 *Share of marriages ending in divorce within 15 years, selected European countries (marriages concluded in 1994 and 2004, in per cent)*

	Marriage in 1994	Marriage in 2004
<i>Nordic countries, Western Europe, and German-speaking countries</i>		
Austria	29.9	35.7
France	23.2	26.6
Germany	27.9	27.3
Netherlands	25.6	24.8
Norway	27.4	33.4
Sweden	34.6	37.1
<i>Southern Europe</i>		
Italy	7.3	8.5
Spain	19.7	26.5
<i>Central and South-Eastern Europe</i>		
Czechia	32.4	30.0
Poland	13.4	16.4
Romania	16.3	15.3

Note: These indicators are computed from the period data on divorces by year of marriage, cumulated over 15 years following marriages concluded in 1994 and 2004. More recent data for France and Germany pertain to marriages concluded in 2003, data for Italy refer to marriages from 2002. Data for Spain show dissolved marriages from 1998 instead of from 1994.

Source: Own computations from Eurostat (2020).

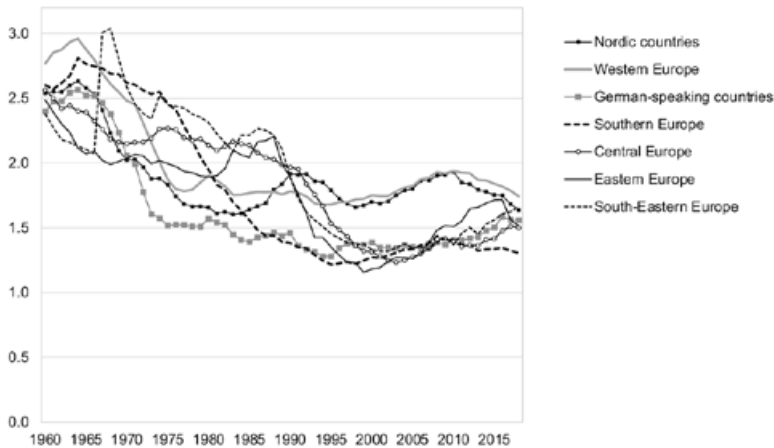
In most countries, divorce has become more widely available and accepted. In Western and Northern Europe and in most parts of Central and Eastern Europe, divorce rates increased sharply during the three decades between 1965 and 1995. During this period, divorce became common, affecting every second to third couple. Since 2000, divorce rates have broadly stabilised in the countries where divorce had been increasing rapidly. The total divorce rate reached levels of 0.4–0.5 in most countries of Western, Northern, Central, and Eastern Europe (Figure 10A.1 in the Appendix). At the same time, in Poland and in Southern European countries, where divorce had been increasing slowly until the early 1990s, the rise in divorce rates has accelerated since 1995. Thus, the cross-country differences in divorce rates have been declining. This trend has been fuelled by a greater acceptance of divorce and the liberalisation of divorce laws in more traditional and socially conservative societies. For instance, in Italy and Spain, previous requirements that couples have an extended period of legal separation before divorcing have been lifted (in 2005 in Spain and in 2015 in Italy), and divorce procedures have been simplified.

Despite some convergence, there are still sharp differences across European countries in the share of marriages ending in divorce and the duration of marriage at the time of dissolution. In the group of countries with higher divorce rates, which now also include Spain, between one-quarter (in the Netherlands) and 37 per cent (in Sweden) of marriages concluded in 2004 dissolved within 15 years (Table 10.2). Among the countries with a lower frequency of divorce, marital breakup within 15 years was much less common, ranging from 9 per cent in Italy to 16 per cent in Poland. Compared with the earlier ‘marriage cohort’ of 1994, the likelihood of divorce has broadly increased or stagnated in more recent cohorts. Highly educated women now have more stable marriages than their lower educated counterparts in an increasing number of European countries, including the Nordic countries, Belgium, the Netherlands, and the United Kingdom (Matysiak et al. 2014). Divorce rates are also increasing among older

couples, including those with adult children; the rise of ‘grey divorce’ has been one of the key divorce trends in recent decades. However, due to the rise in cohabiting unions, divorce rates underestimate the prevalence of union dissolution. In all European countries, cohabiting couples are, on average, more likely than married couples to break up (Andersson et al. 2017).

4.3 Fertility Trends: The Shift towards Unstable, Delayed, and Sub-Replacement Fertility

Across Europe and highly developed countries outside of Europe, fertility trends have, in recent decades, been characterised by a shift towards sub-replacement period fertility rates and delayed parenthood. The fluctuations in the period TFR over time have been partly driven by changes in the timing of births (*tempo effect*). Particularly in periods when rapid social and economic changes have been occurring or family policy interventions have been implemented, couples often respond by changing the timing or the spacing of their births, rather than by reducing or expanding their ultimate family size (Sobotka et al. 2019; Thévenon and Gauthier 2011).



Source: Own computations from Council of Europe (2006), Eurostat (2020), Human Fertility Database (2020), and national statistical office data.

Figure 10.3 Period total fertility rate in European regions, 1960–2018

Figure 10.3 illustrates the main waves of fertility decline, from a universally higher fertility level in the early 1960s to a low fertility level today. Around the turn of the century, the period TFRs in many parts of Europe reached a ‘lowest low’ level at or below 1.3, with more than half of Europe’s population living in countries with such low fertility (Goldstein et al. 2009; Kohler et al. 2002). In the 2000s, period fertility rates saw a sustained recovery in most countries, fuelled in part by positive economic trends, falling unemployment, expanding family policies, and, in some countries, a rising share of migrant women with higher fertility rates (Bongaarts and Sobotka 2012; Goldstein et al. 2009). The gap between higher fertility countries in Western and Northern Europe and the other regions in Europe widened. Some

authors have interpreted this ‘bifurcation’ as a sign that countries and regions characterised by higher levels of gender equality, family-friendly policies, and a more stable economic environment have experienced a lasting shift towards sustained higher fertility rates (Rindfuss et al. 2016). However, the global financial crisis of 2008–2013 marked yet another trend reversal. Especially in the Nordic countries and the Western and Southern European countries, fertility rates levelled off or declined throughout the 2010s, with a later, but sharper fall reported in Eastern Europe after 2015 (Hellstrand et al. 2020). Southern Europe has emerged as the region with the lowest fertility rates (VID 2020). However, a sustained fertility decline has taken place in the 2010s across all countries that previously had higher fertility, with the Nordic countries, Belgium, Ireland, the Netherlands, the United Kingdom, and several other countries in Europe, as well as the United States, reporting a decline in the TFR of 0.2–0.5 between 2010 and 2018. As a result, cross-country variation in period fertility rates declined in Europe during the 2010s, with most countries having a period TFR within a relatively narrow range of 1.4 and 1.7 in 2018 (VID 2020; see also Berrington in this volume).

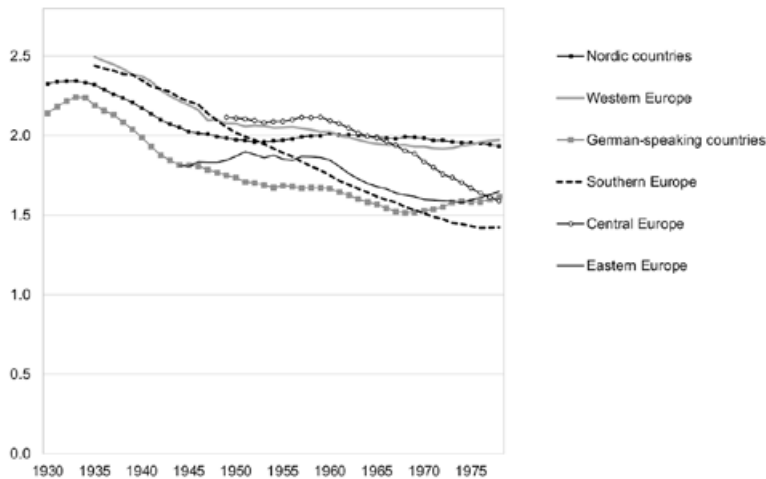
The onset of the major decline in fertility after 1965 coincided in most countries with the beginning of the shift towards delayed parenthood, which has continued up to now. As a result of this ‘postponement transition’ (Kohler et al. 2002), reproductive timing in Europe has shifted from a relatively early to a late first birth pattern. The mean age at first birth has reached around 30 among women in the Nordic countries, the Western and Southern European countries, and the German-speaking countries; around 28 in Central Europe; and around 26 in Eastern and South-Eastern Europe (see also Berrington in this volume). In all of these countries, the mean age at first birth has risen sharply from around 22–25 years in the mid-1970s (Figure 10A.2 in the Appendix). Teenage motherhood – which was relatively common in Central, Eastern, and South-Eastern Europe, as well as in the United Kingdom and a few other countries until the 2000s – has become increasingly rare, while fertility rates have fallen fast among young adult women under age 25 (UNFPA 2018). By contrast, in most countries, fertility rates have increased among women over age 30. The shift to a late first birth pattern has also meant that a rising number of women are planning and having children at late reproductive ages, including in their 40s (Beaujouan 2020). This trend has been accompanied by an increasing risk of infertility and by a wider use of ART⁵ (Sobotka and Beaujouan 2018). In 2015, ART accounted for 4–7 per cent of all births, contributing up to 0.1 to the TFR in some European countries, including in Belgium, Czechia, Denmark, Slovenia, Spain, and Sweden (De Geyter et al. 2020).

In European countries with high immigration rates, migrants from higher fertility countries often retain higher fertility patterns in their host countries, and give a minor boost to the fertility rates in those countries (Sobotka 2008; Tønnessen 2019). In addition, migration among women is often interrelated with childbearing (see Andersson in this volume). Rising numbers of migrants have contributed to the sharp increase in the number and the share of births to parents of migrant or mixed origin in Europe (Bagavos 2019). For instance, in Austria, foreign-born women accounted for 26 per cent of the female population of reproductive age (15–49) and 34 per cent of all births in 2018 (Zeman et al. 2019). Changing family policies have also contributed to short-term shifts in fertility rates, especially in Central and Eastern European countries, where family policies have expanded substantially and changed frequently in the last two decades (Frejka and Gietel-Basten 2016; Sobotka et al. 2019).

4.4 Changes in the Number of Children: Will the ‘Two-Child Norm’ Remain Dominant?

In contrast to period TFR, trends in completed cohort fertility rates are not affected by the shifts in the timing of childbearing. In Western Europe, Southern Europe, and the Nordic countries, completed fertility started declining gradually among women born after the mid-1930s, who were having most of their children during the post-war baby boom era. In Central and Eastern Europe, completed fertility started falling among women born in the 1960s as a result of huge fertility declines in the 1990s (Frejka and Gietel-Basten 2016).

The magnitude of the cohort fertility declines varied by region. Family size was broadly stable among women in the Nordic countries born between 1945 and the late 1970s. In Western Europe, minor declines in cohort fertility ended among women born after 1970, with some countries (including France and the United Kingdom) seeing small upturns in family size among women born in the 1970s. In Germany, the long-term decline in cohort fertility also reversed among women born in the 1970s, possibly due in part to the adoption of family-friendly policies during the 2000s and 2010s (Sobotka et al. 2019). The completed fertility rate in Germany recovered from a low of 1.49 among women born in 1968 – one of the lowest levels in Europe – to 1.61 among women born 10 years later (VID 2020). Small upturns in cohort fertility are also observed in Eastern Europe, especially in Belarus and Russia, among women born in the mid-1970s. By contrast, cohort fertility has fallen most in Southern Europe and, more recently, in Central Europe as well.



Source: Human Fertility Database (2020); CFE Database (2020); Council of Europe (2006); VID (2018, 2020); National Statistical Offices.

Figure 10.4 Completed cohort fertility in European regions, women born 1930–78

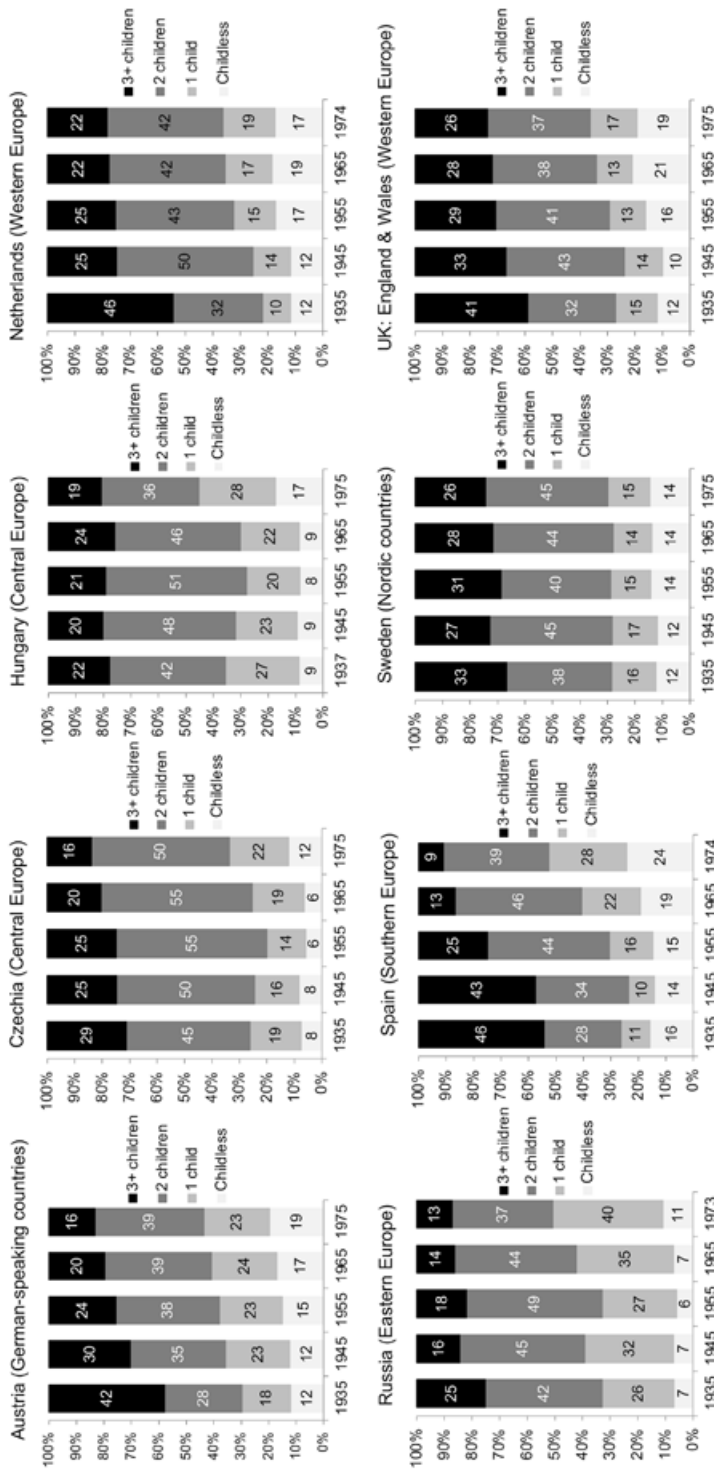
When we look at cohort fertility in Europe among women born in the late 1970s – the most recent cohorts whose family size can be assessed at present – we observe a rift between the higher fertility countries in the North and in the West, with completed fertility at 1.7–2.0, and

very low fertility countries in the South, with completed fertility reaching the lowest levels of around 1.4 in Spain and Italy. Most countries in the other regions have relatively low cohort fertility levels that fall in-between these values, at 1.5–1.7 (Figure 10.4).

The seemingly similar patterns of cohort fertility decline in different parts of Europe mask different trends in fertility decline by birth order (Frejka and Sardon 2007). The earlier phase of fertility decline among women born between the 1930s and the early 1950s was largely driven by a shrinking share of large families with three or more children. Among women born between 1955 and 1970, the decline in fertility was driven mainly by declining progression rates to a second birth in Central and Eastern Europe; whereas in Southern Europe and German-speaking countries, it was driven primarily by declining first birth rates (Zeman et al. 2018). These region-specific pathways to low completed fertility are also visible in trends in the number of children born to women of various birth cohorts in selected countries (Figure 10.5). In the German-speaking countries, the low completed fertility levels are largely due to their relatively high levels of childlessness (as in the case of Austria); whereas in Eastern and South-Eastern Europe, the low fertility levels are attributable to a combination of large shares of women with only one child and small shares of women with larger families (as in the case of Russia) (Breton and Prioux 2009; Frejka and Gietel-Basten 2016). Meanwhile, the very low fertility in Southern Europe (especially in Greece, Italy, and Spain) is due to a combination of high levels of childlessness, large shares of women with only one child, and shrinking proportions of women with three or more children. For example, only 9 per cent of Spanish women born in 1974 had three or more children. By contrast, higher fertility countries such as the Netherlands, Sweden, and United Kingdom do not necessarily have low levels of childlessness, but have smaller shares of women with only one child and larger shares of families with three or more children (Frejka and Sardon 2007). Up to now, changes in the number of children born have not dented the dominance of the ‘two-child norm’. A two-child family ideal is broadly shared across the continent (Sobotka and Beaujouan 2014). In most European countries, the share of women with two children has been stable, and has remained at around 40 per cent among women born in the mid-1970s, with a range of 36 per cent in Hungary to 50 per cent in Czechia.

However, levels of childlessness vary considerably across Europe. In the past, the main split ran between the state-socialist countries in Central, Eastern, and South-Eastern Europe with lower levels of childlessness and the countries of Western, Northern, and Southern Europe with higher levels of childlessness (Brzozowska 2015; Kreyenfeld and Konietzka 2017; Sobotka 2017). This divide is also reflected in the negative attitudes towards voluntary childlessness that have been observed in Central and Eastern Europe (Merz and Liefbroer 2012). Some countries have much higher levels of childlessness than others. In Greece and Spain, around one in four women born in 1978 is permanently childless. In the German-speaking countries and in Italy, Finland, and the Netherlands, around one in five women is childless (Figure 10.5) (Sobotka 2017; VID 2020). In most countries, childlessness is more common among men than among women (e.g., Jalovaara et al. 2019). Surveys indicate that permanent childlessness is not consciously planned or intended by most of the women and men who ultimately remain childless: according to the 2011 Eurobarometer survey, on average across EU countries, only seven per cent of men and five per cent of women of reproductive age (18 to 40) intended to remain childless (Mietinen and Szalma 2014).

The association between education and fertility among women, and its trends over time, differ across European countries and regions. In three of the Nordic countries, Denmark,



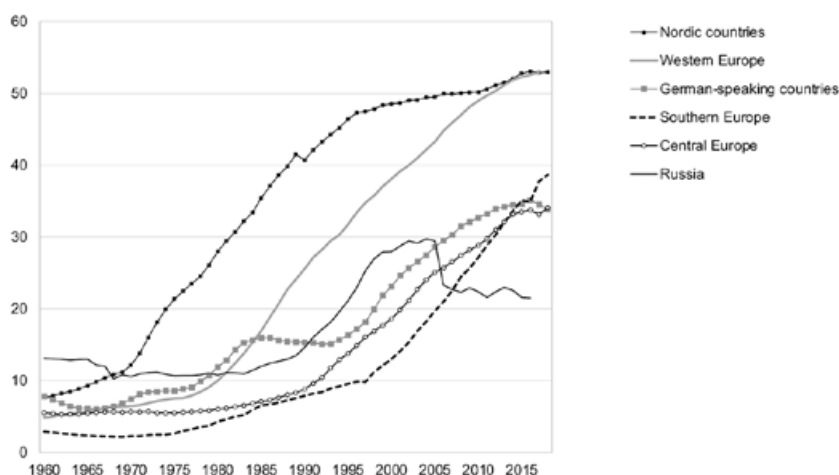
Source: Human Fertility Database (2020); CFE Database (2020); Council of Europe (2006); VID (2018, 2020); National Statistical Offices (published data and own computations).

Figure 10.5 Parity distribution (family size) in selected European countries, women born 1935–75

Norway, and Sweden, completed fertility has fully converged among women with different levels of education born in the early 1970s (Jalovaara et al. 2019). However, the most typical trend among women born in the 1940s–1970s has been the persistence of differences in fertility level by education, either due to a parallel decline in completed fertility across all educational groups, as in the case of Spain, or due to relatively stable differentials over time and across cohorts, as in the case of France (Davie and Mazuy 2010; Sobotka et al. 2017). Yet another pattern can be observed in Eastern Europe and in many countries in South-Eastern Europe, including in Romania and Serbia, where there has been a steep and, in some countries, further widening negative educational gradient in fertility (Sobotka et al. 2017).

4.5 Family Context of Childbearing and Child Rearing: The Eroding Relevance of Marriage

In the 1970s–2010s in Europe, the previously close links between marriage, intimacy, and parenthood progressively eroded, and the timing and sequencing of marriage and childbearing became increasingly disconnected. The shift away from childbearing within marriage can be best illustrated by the trends in the share of children born outside of marriage (Figure 10.6).



Note: Owing to missing data on Ukraine for some years, trends for Russia are shown instead of trends for the whole Eastern European region. Data on South-Eastern Europe are not shown due to missing data for some countries and periods.

Source: Council of Europe (2006); Eurostat (2020); National Statistical Offices.

Figure 10.6 *Share of births outside of marriage (in per cent) in European regions, 1960–2018*

The Nordic countries were forerunners in this trend, with the share of non-marital births in these countries increasing rapidly between 1970 and 1995. Later, this increasing trend slowed down and then levelled off after 2000 at around 50 per cent of births, with a moderate rise noted in the most recent period. A similar sharp rise in extra-marital childbearing began about a decade

later, after 1980, in Western Europe. In Central and Eastern Europe and the German-speaking countries, the rise in non-marital childbearing accelerated after 1990. Subsequently, in the late 1990s, the share of extra-marital births rose sharply in Southern Europe, and especially in Italy and Spain. Today, most countries in Europe report the largest shares of births outside marriage on record, with 10 countries – including Bulgaria, France, the Netherlands, Portugal, and Sweden – reporting that over a half of all children were born outside of marriage in 2018. At the same time, there appears to be a ceiling to the increase in extra-marital childbearing, as the increasing trend has recently slowed down markedly or stopped in all parts of Europe except Southern Europe. A reversal in non-marital childbearing took place in Eastern Europe, especially in Belarus and Russia, where the share of births outside of marriage peaked in 2004–2005, and declined rapidly thereafter.

Most of the increase in non-marital childbearing was occurring among cohabiting couples (Perelli-Harris et al. 2012), and to a lesser extent among couples in less standard living arrangements. Giving birth as a single mother is a rather rare event: typically, fewer than 10 per cent of all births are to single mothers, with the share being higher for first births. In Europe, especially high levels of single motherhood are reported in Russia and the United Kingdom (Perelli-Harris et al. 2012). However, family arrangements have become more complex, and periods spent with a single mother have become more frequent in the course of a child's life due to family instability – divorce, separation, and re-partnering. At the same time, many single mothers start cohabiting with a partner or marry later in life (Jalovaara and Andersson 2018; Thomson 2014). Among children under age three living in the EU, almost one in 10 (9.6 per cent) was living with a single mother in the early 2010s. The United Kingdom was the main outlier, with twice as many children (19.5 per cent) living with a single mother (VID 2015). In an analysis of the prevalence of single motherhood among all children, Härkönen (2017) reported a gradual increase in most countries during the 1990s–early 2010s. In 2006–2010, between 10 and 20 per cent of children in most European countries lived with a single mother, with lower shares in Southern Europe, Serbia, and Slovenia, higher shares of 22–23 per cent in Ireland and the United Kingdom, and a very high share of 27 per cent in Russia.

The rising complexity of partnership trajectories and the higher frequency of re-partnering suggests that having children with more than one partner, or 'multiple partner fertility', has increased over time. While the existing empirical data on time trends are scarce and difficult to estimate (Guzzo 2014; Stykes and Guzzo 2018), this phenomenon has become more visible and is being analysed more frequently, especially in the United States, where 20–25 per cent of all mothers have their children with multiple partners (Stykes and Guzzo 2018). Multiple partner fertility appears to be less common in Europe. Like in the United States (Monte 2019), it is especially frequent in Europe among women and men with larger families. Among Norwegian men born between 1935 and the early 1960s, the share who had children with multiple partners by age 45 increased from a low of about 5 per cent to around 13 per cent (Lappegård et al. 2011). While multiple partner fertility is often linked to becoming a parent early and to having unintended pregnancies (Guzzo 2014), one of the most persistent underlying patterns of this phenomenon is its educational gradient: having children with multiple partners is much more common among lower educated women and men, who often have more complex partnership trajectories (Lappegård et al. 2011; Jalovaara and Andersson 2018; Jalovaara and Kreyenfeld 2020). Paradoxically, men with lower levels of education have the most polarised family distributions, as they are more likely than their better educated counterparts to either

be childless or have a larger family size, often with multiple partners (Lappegård et al. 2011). From a child's perspective, high levels of family instability and re-partnering imply that many children experience the break-up of a parental union as well as living with step-siblings (see Zartler in this volume). In an analysis of Finnish register data for 2003–2009, Jalovaara and Andersson (2018) found that among all children born in a married or cohabiting union, 41 per cent experienced a parental separation before age 15; and that the likelihood of experiencing a parental separation before age 15 ranged from 29 per cent for those with a highly educated mother to 65 per cent for those with a low educated mother.

5. CONCLUSIONS: SHIFTING FAMILY PATTERNS ACROSS EUROPE

Family behaviour in Europe has been fundamentally reshaped in the last half a century. Family changes proceeded at different speeds across the continent, but even the countries that initially seemed 'immune' to this transformation eventually experienced shifts towards lower and delayed fertility and marriage, greater union instability, more diverse families and living arrangements, and 'disordered' family life course pathways. These shifts have been especially rapid in a number of countries where, until the 1980s, the erosion of the traditional family was relatively slow and the influence of the Catholic Church on family attitudes and legislation remained strong, including in Ireland, Italy, and Spain. Changes in family behaviour have also been swift in many parts of Central and South-Eastern Europe that underwent a transition from state socialism to liberal democracy, including in Czechia, Hungary, and Slovenia. Eastern Europe (especially Belarus and Russia) is the only broader region that appears to have taken a different path that is characterised, at least in part, by a return of marriage and a high normative valuation of the 'traditional' family. This re-traditionalisation process is reflected in both the official rhetoric of these countries and in the actual behaviour of the population, as the share of children born outside of marriage has been continuously declining in Eastern Europe since 2005.

In recent decades, the Nordic countries, and especially Sweden, have often been perceived as forerunners in emerging family trends, but also in innovative family policy approaches and gender egalitarianism (Goldscheider et al. 2015). Recently, family transformations in a number of other regions have 'caught up' with the earlier shifts in the Nordic countries. Are new trends emerging in the Nordic countries? Perhaps the most notable recent trend in Sweden and other countries in Northern Europe is a broad stabilisation of family behaviour, especially in the frequency of marriage, divorce, and the level of fertility among women and men born in the 1970s (Ohlsson-Wijk et al. 2020). At the same time, recent period fertility declines in the Nordic countries suggest that there will be shifts towards smaller family sizes, higher levels of childlessness, and even later family formation among women born in the 1980s and 1990s. These trends call into question earlier predictions of a family 'comeback' in the region (Goldscheider et al. 2015).

Education has become a key marker of social status and economic resources, with low and medium educated individuals, and especially men, increasingly lagging behind their counterparts with a university degree (Boertien and Permanyer 2019; Adsera 2017). This trend has been amplified by a shift towards more educational homogamy and assortative mating (Van Bavel 2012). Lower education is closely linked with partnership complexity and instability,

and, especially among men, with a greater likelihood of remaining childless and single over the life course. Cohort data for women and men born before the 1970s do not yet show a consistent pattern of reversals in the previously observed associations between education, fertility, union formation, and marriage. However, recent research has suggested that higher education is becoming a ‘bonus’ that improves the chances of forming a partnership for women as well as for men (De Hauw et al. 2017). Gender equality matters as well: highly educated women are more likely to be married in more gender-equal societies (Kalmijn 2013).

How do the recent family trends fit within the broader theoretical frameworks of family change? By and large, especially at the level of countries, the SDT captures well the European-wide shifts in family behaviours in recent decades. Arguably, the main exceptions to these general trends are the Eastern European countries, where the ‘pattern of disadvantage’ framework appears to be more pertinent, especially in explaining the shifts in childbearing outside of marriage. It appears that applying the pattern of disadvantage framework, together with the GR perspective, can improve our understanding of the shifting social stratification in partnerships, marriages, living arrangements, and family stability. However, country-level trends in family behaviours do not lend support to the arguments that gender equality and economic and social development will usher in a lasting reversal in family trends towards higher fertility, more marriage, and more stable unions.

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NOTES

1. A small share of people who are formally married are not living with their spouse and are either living independently or cohabiting with another partner. However, in most European countries where divorce is relatively easy to obtain, people tend to dissolve their marriage before or relatively soon after moving out to live independently or with a new partner.
2. Since the term LAT first appeared in 1999, researchers of non-residential partnerships have followed different definitions and conceptualisations of these relationships, considering factors such as their length, stability, level of commitment, typology (including or excluding dating relationships), and whether they are voluntary (Pasteels et al. 2017). Surveys on family-related behaviour also offer different conceptualisations of LAT relationships. For instance, the core of the Generations and Gender Survey question on LAT, analysed by Pasteels et al. (2017) asks: ‘Are you currently having an intimate (couple) relationship with someone you are not living with?’.
3. According to the EU Statistics on Income and Living Conditions survey from 2018, among young adults aged 25–29, only 8 per cent were living with their parents in the Nordic countries, compared with 24 per cent in Western Europe, 29 per cent in the German-speaking countries, and 55 per cent in Central Europe (data exclude Croatia). Two out of three young adults were still living with their parents in Southern Europe (65 per cent, own computation from Eurostat 2019b data).
4. Data for Finland show that the share of young adults co-residing with other people who are not their partners, parents, or relatives peaked at 10–12 per cent at ages 20–22 for women and at ages 21–24 for men in 2016. Between 2005 and 2016, this share increased the most at ages 21–29, and faster among men (by 3.8 percentage points on average) than among women (by 2.4 percentage points on average) (own computations from Statistics Finland 2020).

5. Assisted reproductive technology involves medical procedures that handle both human oocytes and sperm or embryos for the purpose of establishing a pregnancy. ART includes in vitro fertilisation (including intracytoplasmic sperm injection), frozen embryo and oocyte replacement, use of donor eggs, and other methods.

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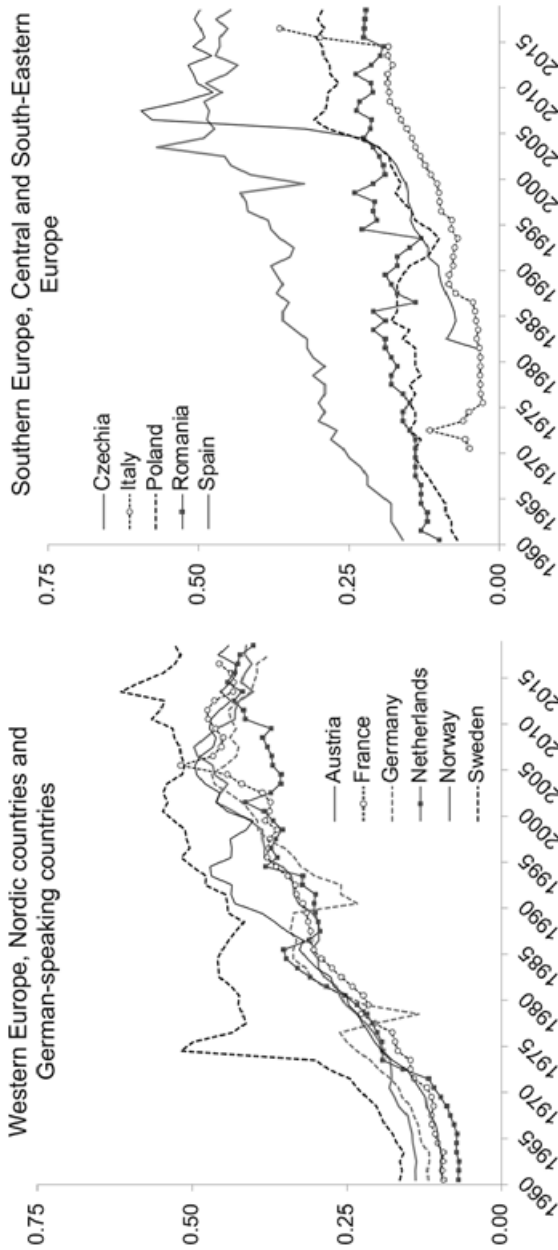
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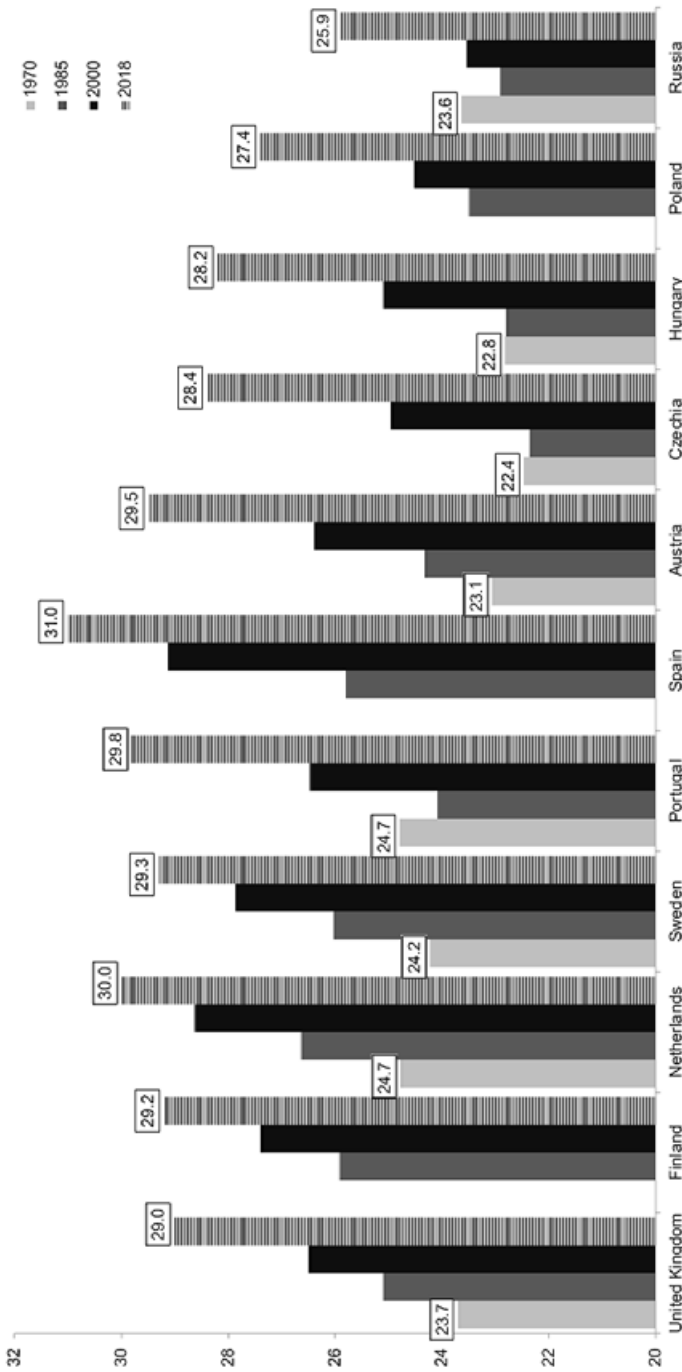
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APPENDIX



Source: Own computations from Eurostat (2020).

Figure 10A.1 Total divorce rate in selected European countries, 1960–2018



Source: Own computations from Council of Europe (2006), Eurostat (2020), Human Fertility Database (2020), and national statistical office data.

Figure 104.2 Mean age at first birth, women in selected European countries, 1970–2018

11. Living arrangements across households in Europe

Chia Liu and Albert Esteve

1. INTRODUCTION

This chapter explores living arrangements across 21 European countries. Globally, European living arrangements are characterised by uniquely high levels of single-person households, the predominance of nuclear families, and low levels of intergenerational co-residence between adult children and their parents (Eurostat 2015; United Nations 2018). European households show lower levels of complexity than households in Africa, Latin America, or Asia (Esteve and Liu 2018; Esteve et al. 2012). European households overwhelmingly consist of married or cohabiting parents with their minor children. However, living arrangements are far from homogenous across European countries. A wide range of family forms and household types can be found across sub-regions and countries within Europe.

The diversity of living arrangements in Europe is the result of deep historical roots of family systems that trace back to preindustrial times (Hajnal 1982). The structural or cultural nature of this diversity has been debated since the late nineteenth century. The main focus of these debates has been on intergenerational co-residence between adult children and their parents. Earlier scholarship on intergenerational co-residence centred on its relationship with economic development (Le Play 1871). By the twentieth century, it was widely accepted that single-generation nuclear families had become dominant in the West as a response to the needs of industrial societies for flexibility and individualism (Burgess 1916; Ogburn 1933; Parsons 1949). It was further assumed that with economic development, the nuclear family would inevitably spread across the world (Goode 1963). However, little, if any, of this theorising was informed by empirical analyses of large-scale trends until Peter Laslett compiled crude measures of family composition for 100 preindustrial English communities (Laslett and Wall 1972). His findings led to the revisionist hypothesis that there has been no long-term change in family composition (Hareven 1993), and that the indelibility of family norms and values would ensure regional diversity for centuries to come (Hajnal 1965; Reher 1998; Thornton 2013). The validity of this assumption is supported by the heterogeneity of living arrangements that is still present in Europe.

This chapter provides an account of Europe's regional diversity in living arrangements. A traditional way to approach the study of family diversity is by using the family as a unit of analysis. Given the nature of our data, we take an 'individual approach' in which we use the individual as a unit of analysis and classify the respondents by their living arrangements. This enables us to break down the analysis by individual-level characteristics, such as by age and sex. The age distribution of living arrangements provides valuable information for characterising family diversity over the life course and across countries. Moreover, the tabulation of living arrangements by age provides insights into when people experience major life course transitions in the family domain, such as leaving the parental home, partnership formation,

having children, and union dissolution. This chapter highlights the diversity of these patterns within contemporary Europe, and allows us to investigate at which ages the living arrangements of Europeans are more likely to diverge or to converge. Data for this analysis come from the Labour Force Survey (EU-LFS) 2006 and 2016.

2. FAMILY TRANSITIONS AND FAMILY DIVERSITY

Based on the previous literature and the existing knowledge of family dynamics in Europe (Buchmann and Kriesi 2011), we expect to observe that cross-national variations in key transitions to adulthood (Billari and Wilson 2001; Goldscheider and DaVanzo 1985) have the largest implications for living arrangements. These transitions revolve around the magnitude and the timing of leaving the parental home, forming a union, and having children. The first transition determines the length of an individual's co-residence with their parents. Nearly all children in Europe live with their parents (or at least one parent) until they leave the parental home, which typically occurs once they reach adulthood. This transition takes place at different ages across European countries. It occurs later for young adults in Mediterranean countries than for their counterparts in Northern or Western Europe (Reher 1998). A move out of the parental household often coincides with the formation of a conjugal union (Billari and Liefbroer 2010; Fokkema and Liefbroer 2008). However, the widespread postponement of union formation weakens this association. Thus, the postponement of union formation has direct implications for living arrangements. A young adult may set up their own independent household, or extend the period of co-residence with their parents before entering into a committed relationship.

However, while the ages at union formation and the types of unions young adults form differ across Europe, married or cohabiting couples almost always live independently from their parents, as multigenerational households are uncommon in Europe. Thus, most Europeans do not live with their parents, spouse, and children at the same time. Women tend to leave their parents' home earlier than men because women typically form conjugal unions at younger ages than men (Eurostat 2019). Unlike in other parts of the world, such as in Asia (Esteve and Liu 2018), stem families, which are characterised by the intergenerational co-residence of married adult children with their parents, are far less common in Europe.

Marriage or partnership formation usually marks the end of parental co-residence, and the beginning of co-residence with a partner, and, eventually, with children. Despite the drop in fertility rates and the increase in childlessness across European countries, complete and voluntary childlessness among couples is still rare in Europe (Miettinen et al. 2015). Thus, most middle-aged, partnered individuals also live with at least one minor child. However, due to rising union dissolution rates, single parenthood has been increasing rapidly in Europe. This trend has direct implications for living arrangements, as the share of adults who co-reside with a spouse is reduced, as is the percentage of children raised by both parents in the same household.

Finally, living alone is also a relatively common living arrangement in the European context. The percentage of people living alone differs greatly by age and sex. In Europe, individuals are more likely to forego union formation, to exit a dysfunctional relationship, and to remain single after union dissolution or widowhood – and, hence, to live alone in old age – than their counterparts in the rest of the world (Esteve et al. 2020; United Nations 2018). Elderly women are particularly likely to live alone. At younger ages, the postponement of union formation and

childbearing may contribute to increasing levels of ‘living apart together’ relationships, union dissolution, and childlessness.

3. DATA AND METHODS

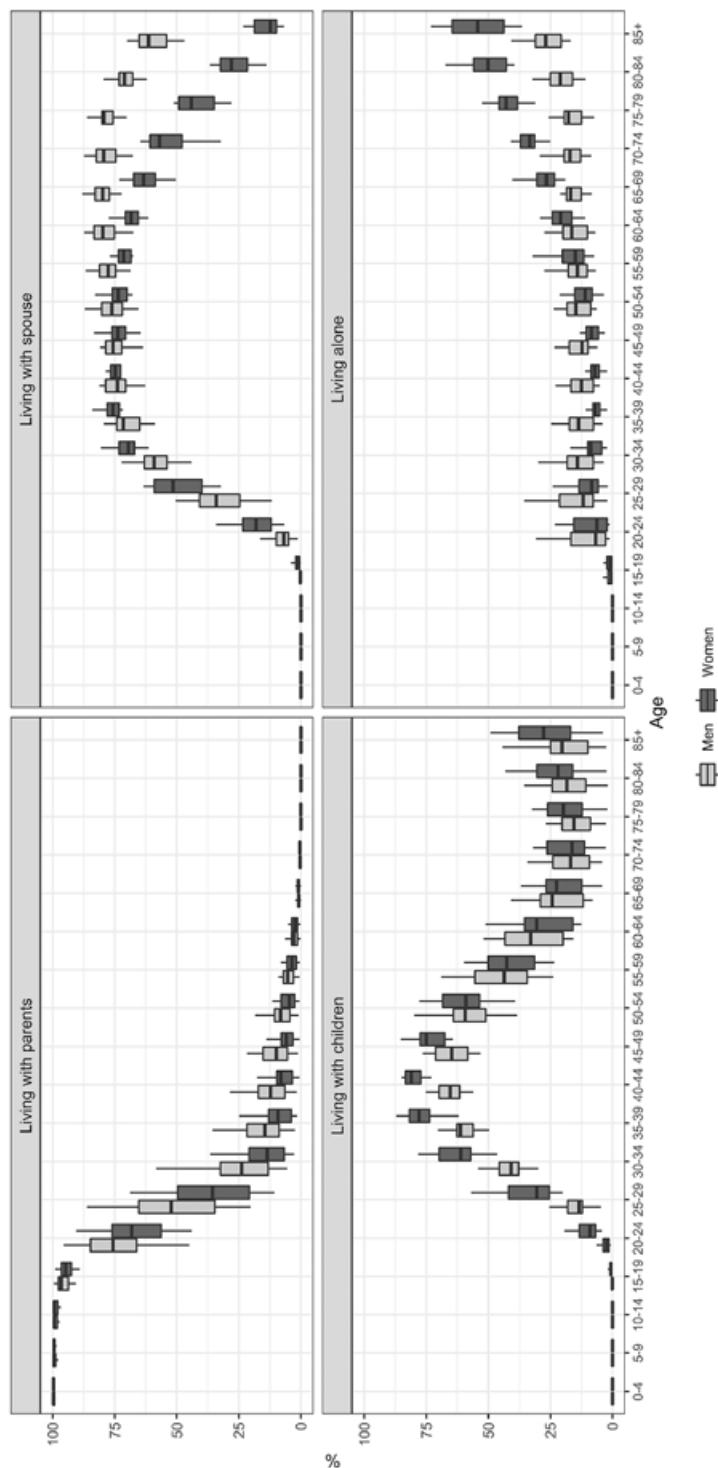
Using data from the cross-sectional EU-LFS, we examine the living arrangements of Europeans across different life stages, and describe how these arrangements changed between the years 2006 and 2016 by country, sex, and age. The EU-LFS is a collection of nationally representative random sample surveys across 35 European countries. Access to the data is provided by Eurostat through quarterly and yearly files. The data have been harmonised to facilitate cross-national comparisons (e.g., Alders and Manting 2001; Fokkema and Liefbroer 2008). For this chapter, we use yearly files, and select two data points: 2006 and 2016. In order to study living arrangements, we require microdata in which households and family units can be identified. The analysis is therefore restricted to those samples that include household-level data. Most Scandinavian countries are excluded from our analyses because household information for these countries is not available from the EU-LFS, which limits our final analyses to 21 countries. For presentation purposes, we assign these countries to the following sub-regions based on geographic criteria: Southern Europe, Eastern Europe, Northern Europe, and Western Europe.

EU-LFS samples provide the information needed to establish who is related to whom within each household. In particular, the data link children to their parents, parents to their children, and conjugal partners to each other (either married or cohabiting). Therefore, for each person, we know whether their parents, partner, or children are present in the household. We focus exclusively on three partially overlapping categories in this chapter: namely, (1) the presence of a partner in the household, (2) the presence of children in the household, (3) the presence of parents in the household, and (4) living alone. Since European adults seldom live with their grandparents or with other relatives, we do not take further categories and living arrangements into account. Our analyses are focused on respondents aged 0–79. People aged 80 and above are omitted, as the risk of entering institutional care increases rapidly with age, and the data are not suited for investigating non-private households.

4. THE STRUCTURE OF LIVING ARRANGEMENTS ACROSS EUROPEAN COUNTRIES

4.1 Patterns by Age

Figure 11.1 shows the aggregate pattern of co-residence by age based on data from 21 European countries. Each panel of the boxplots depicts the percentages by age of men and women living with their parents, a spouse, their children, or alone. These categories are not mutually exclusive. This figure displays the general age pattern of living arrangements and variations across countries. Boxplots depict groups of numerical data through their quartiles. The band inside the box indicates the second quartile (the median); and the bottom and the top limit indicate the lower and the upper quartile, respectively. The upper and the lower whiskers



Source: EU-LFS (2016), authors' elaboration.

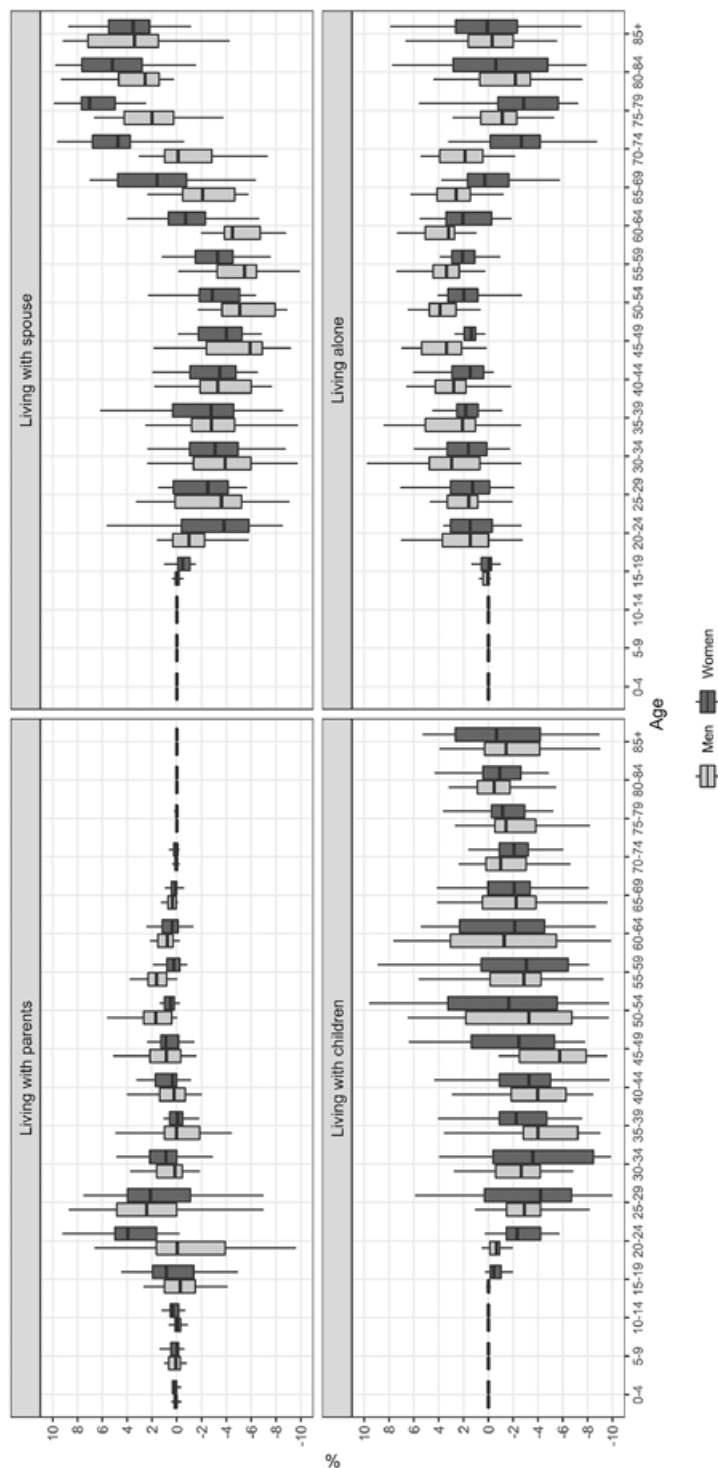
Figure 11.1 Percentage of individuals living with their parent(s), a spouse/partner, their child(ren), or alone by age and sex in 21 European countries in 2016

represent values outside of the upper and the lower quartiles. The length of the boxes shows the extent of variation across European countries.

The living arrangements of European children under age 20 were remarkably similar in 2016. The vast majority of children were living with at least one parent. Of the children who were living with only one parent (results not shown here), 90 per cent were living with their mother. As individuals reached their early 20s, their likelihood of living with their parents declined rapidly. When people were in their mid-20s to 30s, they became increasingly likely to be living with a spouse and children. The propensity to live alone was generally low throughout the earlier stages of the life course, but increased with age. There were, however, clear gender differences. First, women tended to leave the parental home earlier than men, primarily because women typically form unions at younger ages than men. At age 25, about 75 per cent of men were living with their parents, compared with roughly 70 per cent of women. By age 30, that gap had widened to roughly 51 per cent versus 30 per cent. Second, men tended to have stable patterns of spousal co-residence throughout the life course, with 75 per cent of men living with a spouse between ages 40 and nearly 80; whereas a similar share of women were living with a spouse at around age 40, but this share declined after age 50. Women were more likely than men to be living with children in the peak years for child co-residence; namely, ages 30 to 50. In the older age groups, women were more likely than men to be living alone. More than 50 per cent of women were living alone after age 85, whereas the share of men of the same age group who were living alone was roughly 10 percentage points lower. This was mainly because men tended to partner with younger women, and were thus less likely to experience widowhood than women, who were usually partnered with older men. Living with an adult child in old age was rare in Europe, with only about one-quarter of older individuals living with a child.

These general age patterns and gender differences held across all European countries, but within-region variations remained. Such variations were directly attributable to differences in the timing and the intensity of leaving the parental home, union formation, childbearing, union dissolution, and widowhood. The largest cross-national differences are observed between ages 20 and 34, and were mostly determined by the different tendencies of young adults to live with their parents. At ages 25–29, we find the largest differences in parental co-residence patterns across Europe for both men and women. The percentages of the men in this age group co-residing with their parents ranged between less than 20 per cent to more than 90 per cent. Cross-national variations in the shares of young adults co-residing with a partner or with children were also substantial, but were not as great as the levels of variation observed for parental co-residence. Variations in patterns of parental co-residence were, to a certain extent, replicated at older ages, when we observe the prevalence of parent–child co-residence from the parents’ perspectives. From that perspective, cross-national differences were smaller because not all older adults had children, and those who did became parents at different ages. However, even after taking these factors into account, the shares of parents co-residing with children at ages 55–59 ranged from less than 25 per cent to 75 per cent. By contrast, the living arrangements of Europeans in their late 30s to 40s were similar.

Next, we examine how living arrangements changed across Europe between 2006 and 2016. The four panels of Figure 11.2 show the absolute changes in the percentages of individuals living with their parents, a spouse, their children, and alone by age and sex between the two years. Living arrangements were far from static during the observed period. Indeed,



Source: EU-LFS (2006, 2016), authors' elaboration.

Figure 11.2 *Percentage changes in living arrangements by age, sex, and type of co-residence for 21 European countries from 2006 to 2016*

substantial changes are observed in all types of co-residence. Some of these changes were occurring simultaneously in all countries, whereas other trends were diverging.

The likelihood of parental co-residence remained stable for the majority of age groups, but increased considerably among people in their late 20s. In the majority of countries, 25–29 year olds were more likely to be living with their parents in 2016 than in 2006, which suggests a delay in leaving the parental home. Conversely, the likelihood of living with a spouse decreased visibly throughout adulthood, with the exception of a sizable increase in late adulthood. It is probable that these trends resulted from a combination of factors, including increases in singlehood, delays in marriage or cohabitation, and union dissolution. However, the increase in spousal co-residence later in life is likely attributable to longer life expectancy and a narrowing in the gender gap in mortality. Thus, both men and women were less likely to experience widowhood, with women's chances of losing a spouse decreasing when compared with men. In line with lower levels of spousal co-residence, levels of child co-residence declined across all adult age groups between 2006 and 2016. For the oldest age groups, the likelihood of living with children changed little. Individuals roughly aged 35 to 50 became 2–3 per cent more likely to live alone, while the oldest individuals became less likely to live alone. The latter finding is in line with the higher levels of spousal co-residence shown in the plot above, as increases in life expectancy were also increasing the duration of unions (assuming that couples did not divorce or separate).

4.2 Co-Residence with Parents

While bearing the patterns observed in Figures 11.1 and 11.2 in mind, we now turn our attention to the ages and the types of co-residence in which we see the largest cross-national variations. We start by examining the likelihood of co-residing with parents among 25–29-year-old men and women. In Table 11.1, we show the percentages of individuals living with at least one parent between the ages of 25 and 29 by sex, union status, and country. We distinguish the following overlapping categories: a) 'single', meaning that the person was unmarried and did not share a household with a partner; b) living with a partner, regardless of marital status; and c) not living with a partner and being widowed, divorced, or legally separated. In the first column, we show the total percentage of young men living with their parents, as depicted in Figure 11.1. By region, Eastern and Southern European countries had higher levels of parental co-residence than Northern and Western Europe. By country, Hungary (86.2), Italy (74.3), and Greece (73) had the highest levels of parental co-residence. The lowest percentages are seen for young adults in Estonia (20.2) and the Netherlands (2.8). In all countries, women had lower levels of parental co-residence than men, with Hungarian women the highest (68.7) and Dutch women the lowest (10.6) levels.

The percentages of singles living with their parents was close to the total, as the vast majority of adults living with their parents at these ages were single. Again, Southern and Eastern European countries had the highest values, and the Western and Northern European countries had the lowest values. Hungarian (94.6), Slovakian (84.5), and Italian (80.6) single men were particularly likely to be living with at least one parent. On the other hand, just 23.5 per cent of Estonian single men were living with their parents. Single women in Hungary (95), Slovakia (76.1), Italy (75.5), and Greece (74.7) had a high likelihood of living with their parents. Despite gender differences in levels of co-residence, daughters and sons showed a roughly equal propensity to be living with their parents in all countries.

Table 11.1 *Percentage of 25–29 year olds living with at least one parent by sex, marital status, and country in 2016*

	Males				Females			
	Total	Single and not living with partner	Living with partner	Widowed, divorced/legally separated, and not living with partner	Total	Single and not living with partner	Living with partner	Widowed, divorced/legally separated, and not living with partner
Western Europe								
Austria	34.7	38.7	16.2	29.1	20.7	27.4	4.3	19.7
Belgium	36.9	41.0	7.2	26.3	21.9	28.1	3.5	14.3
France	24.4	27.5	3.6	37.3	12.4	15.1	2.4	10.7
Germany	23.2	27.7			13.1	18.7		
Netherlands	21.8	25.8	1.0		10.6	14.1	1.7	
Northern Europe								
Estonia	20.2	23.5	3.0	19.2	14.6	19.1	2.5	23.9
Ireland	45.0	49.3	7.6	9.0	36.6	44.1	4.4	22.0
Latvia	52.2	63.1	10.2	7.7	35.6	48.3	12.6	34.6
Lithuania	38.4	47.5	13.4	34.1	21.8	37.5	7.8	11.8
United Kingdom	29.9	36.1	6.4	16.4	17.3	24.5	1.8	6.0
Eastern Europe								
Czech Republic	44.7	52.0	2.7	18.8	25.6	34.6	4.3	14.7
Hungary	86.2	94.6	47.6		68.7	95.0	15.1	
Poland	53.7	72.6	15.8	56.5	38.8	63.2	16.2	51.8
Romania	64.8	74.9	35.2	56.1	33.2	61.8	9.0	56.5
Slovakia	75.1	84.5	25.3	13.3	58.0	76.1	21.5	49.2
Southern Europe								
Cyprus	53.0	64.2	12.4	58.8	45.6	62.9	15.8	28.4
Greece	73.0	78.5	15.1	70.3	54.9	74.7	6.0	67.6
Italy	74.3	80.6	13.6	31.3	58.1	75.5	4.6	41.9
Portugal	65.3	70.8	9.3	56.4	51.9	61.1	13.4	12.7
Slovenia	58.3	62.5	18.5		44.2	55.7	5.0	41.2
Spain	67.8	73.2	6.4	49.6	49.6	60.0	6.8	41.2

Source: EU-LFS (2016), authors' elaboration. Empty cells indicate lack of cases in this category.

Individuals who were married or partnered were seldom living with their parents, as patrilocal-ity or matrilocality are uncommon in Europe. Despite these lower levels, there were substantial differences across regions and countries. The highest levels of parental co-residence among married/partnered populations were in Eastern Europe, with values above 15 per cent for men, except in the Czech Republic. Levels of intergenerational co-residence for married young men were also high in Hungary and Romania, where more than one-third of married sons were living with their parents. About one out of every six young, married women in Poland, Cyprus, and Hungary were living with their parents. As there were no systematic differences

in these patterns between men and women, there was no clear evidence for patrilocality versus matrilocality. However, further analysis is needed to confirm this finding.

The individuals who were not in a union, but who were widowed, divorced, or legally separated, were more likely than those in a union, but less likely than their single counterparts, to be living with their parents. Systematically, men in this situation were more likely than women to be co-residing with their parents. Such living arrangements were most common in Southern and Eastern European countries, and the differences in the likelihood of parental co-residence between this group and the married/partnered group were greatest in these countries.

4.3 Spousal and Child Co-Residence at Different Life Stages

Next, we look at spousal and child co-residence for individuals in the age groups of 25 to 29, 40 to 44, and 55 to 59 based on 2016 data. Table 11.2 shows the percentages of individuals by sex and age group who were living with a (married or unmarried) partner. The right part of the

Table 11.2 Percentages of individuals living in a union (marital or non-marital) by sex, selected age groups, and country in 2016

	Males			Females		
	25–29	40–44	55–59	25–29	40–44	55–59
Western Europe						
Austria	39.5	86.5	49.7	49.3	87.1	38.3
Belgium	32.9	78.3	44.0	33.6	74.7	28.8
France	41.2	86.0	40.0	52.3	90.1	29.4
Germany	34.4	79.2	38.4	43.4	82.2	27.3
Netherlands	23.9	85.5	47.9	36.4	85.2	33.8
Northern Europe						
Estonia	58.0	81.3	32.9	71.5	88.5	25.8
Ireland	42.3	87.6	63.1	53.2	90.5	54.2
Latvia	70.5	85.7	47.1	75.4	86.0	43.6
Lithuania	58.8	92.1	39.0	74.5	89.5	32.0
United Kingdom	41.3	79.9	41.3	48.9	83.7	33.4
Eastern Europe						
Czech Republic	43.0	86.6	38.6	54.1	89.0	25.9
Hungary	66.9	91.7	75.2	72.4	95.5	61.0
Poland	59.5	91.3	51.0	67.6	90.8	43.4
Romania	53.7	88.7	58.4	64.5	88.2	47.1
Slovakia	67.8	92.2	59.3	70.0	92.7	49.4
Southern Europe						
Cyprus	37.9	90.3	76.3	50.6	92.5	61.4
Greece	38.9	81.5	63.3	56.2	83.6	46.7
Italy	57.0	84.5	77.4	65.8	87.2	66.3
Portugal	45.3	91.5	66.4	51.2	93.1	55.8
Slovenia	51.7	89.6	58.6	62.4	91.4	45.9
Spain	40.6	82.7	70.2	47.1	86.1	60.6

Source: EU-LFS (2016), authors' elaboration.

table displays the percentages of all individuals who were living with children out of all individuals in a union. The results by country show that in France, more than half of men and about 63 per cent of women were married or partnered by ages 25 to 29. The figures were similar for the Netherlands, the United Kingdom, and Estonia; but were far lower in the Southern European countries. Less than 12 per cent of men in Greece and about 13 per cent of men in Italy of the same age group had formed a conjugal union. Out of all individuals who were in a union at ages 25 to 29, the percentage who had children was higher in the Baltic states and in Eastern European countries. About 71 per cent of men and three-quarters of partnered women had children in Latvia, compared with less than one-quarter of men and 36.4 per cent of women in the Netherlands. Within each geographic region, France, Latvia, Hungary, and Italy stand out for having higher levels of early childbearing than their neighbours.

Table 11.3 Percentages of individuals living with children by sex, selected age groups, and country in 2016

	Males			Females		
	25–29	40–44	55–59	25–29	40–44	55–59
Western Europe						
Austria	36.3	70.5	74.6	52.5	75.6	67.5
Belgium	39.4	73.9	72.1	57.8	72.7	68.2
France	50.4	74.9	76.3	62.9	73.8	68.4
Germany	34.1	67.9	73.1	51.5	72.7	71.8
Netherlands	43.9	74.4	75.3	59.5	76.4	75.8
Northern Europe						
Estonia	43.5	72.8	68.6	63.4	66.2	53.9
Ireland	28.4	79.0	77.7	39.8	74.1	71.4
Latvia	37.3	64.6	70.3	52.5	64.5	55.2
Lithuania	25.6	62.6	63.8	42.2	57.8	51.0
United Kingdom	50.3	79.3	77.3	59.7	72.8	70.0
Eastern Europe						
Czech Republic	41.2	77.1	81.1	59.1	75.3	71.2
Hungary	17.9	74.4	82.3	32.2	78.6	76.2
Poland	40.8	81.1	80.9	56.9	78.3	73.4
Romania	32.6	80.9	78.9	61.0	84.9	71.1
Slovakia	21.5	72.5	82.3	41.2	76.6	70.3
Southern Europe						
Cyprus	34.2	80.5	86.7	45.2	72.5	74.4
Greece	11.7	71.8	84.2	33.9	78.3	76.9
Italy	13.2	70.7	79.7	32.9	74.8	72.7
Portugal	26.3	78.6	82.7	37.6	73.5	75.5
Slovenia	24.7	70.7	75.4	43.7	78.6	72.5
Spain	22.1	73.0	78.8	39.8	74.8	72.5

Source: EU-LFS (2016), authors' elaboration.

The proportion of individuals in a union reached its peak at ages 40 to 44. Gender differences in spousal and child co-residence were lower in this age group than in the 25 to 29 age group, with men actually having a higher level of spousal co-residence than women in some countries. However, depending on the partnership form, union dissolution, and re-partnership patterns, spousal co-residential patterns can be difficult to disentangle. The share of men who were living with a spouse was over 80 per cent in Poland, Romania, and Cyprus; and was over 70 per cent in most other countries. The share of women who were co-residing with a spouse was over 70 per cent in all countries other than the Baltic states, and was close to 85 per cent in Romania. Most coupled individuals in the 40 to 44 age group had children.

Table 11.3 shows the percentages of men and women who were living with their own children. Parent-child co-residence may have different origins. The children of parents in the 55 to 59 age group may not have left their parents' home, or they may have left home but continued to reside in their parents' household. Given that the average age of childbearing in 1985 was roughly 26 years old for women in today's EU-25 (Eurostat 2006), and most individuals choose a partner close to their age, we can assume that, on average, 55–59-year-old parents in 2016 had children in the age range of 25 to 35. However, men were more likely than women to have younger children, particularly those who partnered or re-partnered with much younger women. As we observed for Figure 11.1, the large cross-national differences in levels of co-residence with children at these ages likely reflect differences in the ages at which young adults were leaving the parental home. Levels of parent-child co-residence were lower in Northern and Western Europe than in Eastern and Southern Europe. Women had systematically lower levels of parent-child co-residence, mainly due to their early patterns of childbearing.

4.4 Single Parenthood

The patterns of living arrangements described up to this point have been observed through a set of non-mutually exclusive categories. Thus, both in theory and in practice, one person could be living with their parents, spouse, and children at the same time. Of all possible combinations, we focus now on single parenthood, a term we use for all individuals co-residing with at least one child, but not with a spouse. It is likely that the majority of single parents became single following a union dissolution, but we cannot verify that this is the case given the limitations of the data. The results shown in Table 11.4 indicate the prevalence of single parenthood in Europe by sex, age group, and country. At all ages and in all countries, the likelihood of being a single parent was far lower for men than for women. Single parenthood was more common in Northern Europe than in other regions, and reached its highest level among those around 40 years of age.

Very few European men in the 25–29 age group were living with a child but without a partner; the highest shares of single fathers in this age group were in Latvia and Lithuania, hovering at around 1 per cent. For women aged 25–29, the percentage who were single mothers ranged from 1 per cent in Greece to 14.7 per cent in Latvia, with other Northern European countries being in the same ballpark. Outside of Northern Europe, France, the Czech Republic, Poland, and Slovakia also had relatively high proportions of young single mothers, at over 8 per cent each. Among the 40–44 age group, the percentages of unpartnered men and women with children doubled or tripled in most countries. Lithuania led the European countries in single parenthood, with more than 30 per cent of women and more than 6 per cent of men living with at least one child and without a partner. Women in Greece and men in Italy

Table 11.4 *Percentages living with child(ren) but without a partner by sex, selected age groups, and country in 2016*

	Males			Females		
	25–29	40–44	55–59	25–29	40–44	55–59
Western Europe						
Austria	0.1	1.2	2.4	4.1	11.3	7.8
Belgium	0.5	2.4	5.3	4.2	13.3	10.3
France	0.6	4.2	3.5	8.5	17.0	9.1
Germany	0.5	2.2	2.3	5.9	13.2	5.4
Netherlands	0.2	1.8	3.3	3.9	12.2	5.7
Northern Europe						
Estonia	0.3	3.1	1.3	11.6	21.5	9.5
Ireland	0.2	1.2	2.7	12.2	15.3	11.3
Latvia	1.2	3.2	4.5	13.3	24.4	18.4
Lithuania	1.0	6.2	4.1	14.7	30.3	15.3
United Kingdom	0.3	2.0	2.4	12.6	16.6	9.6
Eastern Europe						
Czech Republic	0.3	2.1	2.0	8.2	16.1	8.8
Hungary	0.3	1.5	3.3	2.1	8.4	13.3
Poland	0.3	1.1	2.3	8.9	13.6	10.7
Romania	0.3	3.1	4.4	3.6	8.5	13.4
Slovakia	0.3	1.9	2.3	8.3	14.0	13.5
Southern Europe						
Cyprus	0.2	2.2	2.9	3.7	14.6	10.9
Greece	0.0	1.1	2.1	1.0	8.0	8.7
Italy	0.3	0.9	2.8	2.9	9.6	10.9
Portugal	0.1	2.2	3.3	6.3	15.0	11.6
Slovenia	0.5	2.0	2.2	3.2	9.1	9.7
Spain	0.6	1.1	3.4	5.0	11.0	12.9

Source: EU-LFS (2016), authors' elaboration.

were the least likely to be single parents, at 8 per cent and less than 1 per cent, respectively. In late adulthood, at ages 55 to 59, the likelihood of living with children but without a partner increased slightly for men in some countries, especially in Southern Europe and Belgium. This share generally declined for women in this age group, except for women in Romania, Hungary, Greece, Italy, Spain, and Slovenia. This difference was likely due to men having children at later ages.

4.5 Living Alone

Finally, we show the percentages of individuals living alone by sex, age group, and country in Table 11.5. Living alone can occur in different life stages, but is particularly common in later life. We use the age groups 25 to 29, 55 to 59, and 75 to 79 to capture different contexts of single living at various life stages. For the 25 to 29 year olds, living alone generally meant that the young adult had left their parental home, but had not (yet) set up their own conjugal

Table 11.5 *Percentage living alone and percentage never married among those living alone by sex, selected age groups, and country 2016*

	% living alone						% never married among those living alone					
	Males			Females			Males			Females		
	25–29	55–59	75–79	25–29	55–59	75–79	25–29	55–59	75–79	25–29	55–59	75–79
Western Europe												
Austria	22.5	18.6	18.7	18.6	21.7	45.7	97.4	43.6	13.5	95.4	31.1	10.6
Belgium	8.7	17.7	9.3	11.7	17.5	31.1	97.0	35.9	13.1	94.6	22.3	8.1
France	12.6	17.4	18.5	14.6	20.7	43.9	98.6	49.4	15.7	99.8	31.0	9.0
Germany	29.9	20.8	17.7	23.1	20.1	44.1	97.0	46.0	19.1	96.3	28.1	7.2
Netherlands	26.2	19.9	20.1	23.5	17.7	52.5	98.9	46.1	22.2	99.0	40.4	6.2
Northern Europe												
Estonia	0.6	21.7	0.0	13.5	32.2	0.0	99.7	16.1	0.0	99.1	25.1	0.0
Ireland	2.8	14.1	25.1	2.8	14.0	41.0	96.7	64.6	42.4	95.4	47.8	13.0
Latvia	4.3	16.9	19.4	7.2	22.2	47.8	91.3	25.7	12.3	85.1	16.3	10.3
Lithuania	1.7	27.4	15.7	24.1	29.5	49.5	87.1	17.4	11.7	71.3	10.5	6.4
United Kingdom	12.1	17.7	25.7	8.6	19.2	42.9	91.0	43.8	16.3	93.0	27.2	7.2
Eastern Europe												
Czech Republic	12.3	14.0	17.8	9.1	18.6	48.6	96.8	28.0	6.8	97.7	6.5	1.8
Hungary	0.6	8.5	12.5	1.9	7.4	40.7	100.0	59.0	4.0	100.0	29.6	1.7
Poland	5.4	10.2	14.1	6.3	12.4	38.3	97.3	41.2	10.9	97.1	18.5	4.7
Romania	5.7	12.8	21.0	5.8	12.3	44.6	96.5	27.2	3.5	94.3	11.3	1.6
Slovakia	3.0	8.6	11.5	3.5	11.0	38.7	97.5	51.9	11.5	95.9	24.8	5.6
Southern Europe												
Cyprus	0.8	6.7	7.4	8.4	11.6	34.5	94.9	39.4	3.4	98.3	21.2	0.4
Greece	1.7	9.2	15.8	8.3	11.1	41.8	98.7	52.7	13.5	98.2	34.0	6.0
Italy	10.0	13.2	19.1	7.0	13.6	43.9	93.0	48.1	26.0	95.2	30.6	10.8
Portugal	0.9	8.7	10.1	5.8	8.7	34.2	96.6	39.4	13.6	95.9	24.6	10.5
Slovenia	1.5	17.8	20.7	11.3	14.9	47.8	96.3	55.4	24.4	92.7	28.7	7.6
Spain	7.6	10.6	14.7	5.4	10.0	32.0	96.2	45.8	24.2	96.8	37.1	10.3

Source: EU-LFS 2016, authors' elaboration.

household, which could be seen as a transition to adulthood from the young adult's perspective. Living alone for individuals in the 55 to 59 age group could also reflect the transition to adulthood or the departure of their young adult children from the parents' perspective. It also approximated singlehood and union dissolution for those who had passed the peak of their union formation years. To account for singlehood specifically, we show the percentages of those who never married in parentheses. Lastly, most of the 75- to 79-year-old individuals who were living alone were widowed or no longer living with their children, rather than single, since both childbearing and marriage were far more universal for this cohort, who were born between 1937 and 1941. We cap the age at 79 to avoid missing those who moved into nursing homes at very old ages, because EU-LFS does not systematically include individuals living in institutions.

Most of the young adults who were living alone had not married by ages 25 to 29. In most countries, more than 95 per cent of these individuals were unmarried, except in Latvia and Lithuania. Therefore, parental co-residence was the most likely scenario for individuals of this age group. Young adults were far more likely to be living alone in Western Europe than in the rest of Europe. Almost 30 per cent of German men and 23.1 per cent of German women were living alone between ages 25 and 29. The Netherlands had similar rates of 26.2 per cent for men and 23.5 per cent for women. In other parts of Europe, the majority of young men and women were not living alone, with less than 1 per cent of men living alone between ages 25 and 29 in Estonia, Hungary, Cyprus, and Portugal; up to 12.3 per cent living alone in the Czech Republic; and 12.1 per cent living alone in the United Kingdom. For women of the same age group, the share who were living alone ranged from less than 5 per cent in Ireland, Hungary, and Slovakia to as high as 13.5 per cent in Estonia and 24.1 per cent in Lithuania.

In the 55–59 age group, Northern Europeans were generally more likely than their counterparts in other regions to be living alone. This may have been due to union instability in combination with childlessness or the early departure of child(ren). More than one-quarter of Lithuanian men and close to 30 per cent of Lithuanian women in this age group were living alone. This living arrangement was far less common among Cypriot men and Hungarian men, at 6.7 per cent and 8.5 per cent, respectively; and among Hungarian women and Portuguese women, at 7.4 per cent and 8.7 per cent, respectively. A larger proportion of men than women had never been married at this age. Thus, single living among these women might be more attributable to union dissolution than to singlehood.

In the oldest age group of our analyses, 75 to 79, women were far more likely than men to be living alone, and the percentage differences between the 55 to 59 age group and the 75 to 79 age group were starker for women. In most countries, men were similarly likely to live alone in the 55 to 59 and 75 to 79 age groups, whereas women's likelihood of living alone more than doubled from one age group to the next in many countries. For example, about 20 per cent of German men were living alone in both the 55 to 59 and 75 to 79 age groups. For German women, 17.7 per cent were living alone at ages 55–59, but more than half, or 52.5 per cent, were living alone at ages 75 to 79. Interestingly, Ireland had a much higher level of life-long male singlehood than other countries, with 42.4 per cent of 75- to 79-year-old men having never been married, compared to just 16.3 per cent of their counterparts in the neighbouring United Kingdom.

5. CONCLUSIONS

This chapter has provided an overview of living arrangements across 21 European countries based on recent data from the EU-LFS. We have not specifically addressed the background factors that contribute to the observed patterns. Instead, we focused our attention on showing how (dis)similar living arrangements are across European countries, and how these arrangements have changed since 2006.

The variations in living arrangements among European countries were most evident for parental co-residence in young adulthood (20–29 years old), parent–child co-residence in middle to old age (50–69), and lone living for women in the later life stages (80+). The likelihood of spousal co-residence peaked at around 65–69 years old for men, at roughly 77 per cent; but peaked for women at ages 35–39, at around 75 per cent. Living arrangements

changed between the years 2006 and 2016. Young women in particular increasingly delayed their departure from the parental home. Levels of spousal and child co-residence dropped for both sexes, particularly in the peak childbearing years. People were slightly more likely to be living alone in 2016 than in 2006. Levels of spousal co-residence increased substantially at older ages, particularly for women; most likely due to the increased longevity of men. Thus, the likelihood of living alone late in life decreased modestly. Living alone while under age 60 continues to be uncommon in Europe, although it is more prevalent than in other parts of the world (Esteve et al. 2020). In most countries, women were more likely than men to be living alone across all life stages, particularly later in life. As levels of union instability and childlessness rise, living alone in middle and late life stages will become increasingly common.

The regional pattern that emerges in most dimensions studied in this chapter conforms to the traditional pattern that divides Europe into ‘strong’ family systems, such as those found in the Mediterranean countries (Italy, Spain, Greece); and ‘weak’ family systems, exemplified by those found in the Central and Northern European countries, such as Germany and the United Kingdom (Reher 1998; Schwanitz and Mulder 2015). Our findings show that a regional divide in living arrangements persists in Europe. Northern and Western Europe are characterised by earlier departure from the parental home, earlier union formation, and higher levels of lone living. Northern Europe has particularly early childbearing and high levels of single motherhood. Eastern and Southern Europe are characterised by later departure from the parental home, later union formation, and a greater likelihood of co-residing with children at older ages.

Scholars have cited various factors in seeking to explain these patterns. It has, for example, been argued that welfare regimes both complement and reinforce how family members organise themselves by promoting individualism or familism through social care allowances and programmes (Esping-Andersen 1990, 1999). However, there is also evidence that structural factors only partially explain the levels of social exchanges within families, and that the normative climate continues to play a role (Jappens and Van Bavel 2012). The effect of social norms and culture therefore can be bi-directional, or at least difficult to disentangle.

Labour market and other economic conditions drive both individual- and family-level coping strategies, such as living together for the benefit of economies of scale (Danziger and Ratner 2010). In line with research in the United States, European scholars found that the economic crisis of 2008 has delayed the transition to adulthood for individuals aged 18 to 34 (Lennartz et al. 2016). It appears, for example, that people in this age group have been postponing leaving the parental home, delaying union formation (especially for men), and delaying or foregoing childbearing (Pailhé and Régnier-Loilier 2015). These trends, in turn, shape the household structures in which people live, and are reflected in our findings that levels of parental co-residence increased and levels of spousal and child co-residence decreased between 2006 and 2016 for individuals aged 20 to 29.

In the Mediterranean countries, strong intra-familial solidarity persists in the later departure of young adults from the parental home, observed from the perspectives of both the young adults and the middle-aged parents. A delay in marriage is clearly associated with a delay in the departure of young adults from their parents’ home in countries such as Italy (Giuliano 2007). In addition to economic conditions and culture, housing availability and policies can heavily influence the living arrangements of individuals. For example, in Spain, the exceptionally high rate of homeownership (Cabré and Módenes Cabrerizo 2004), in combination with steadily rising rents in major cities across the country in recent years, might have discouraged the younger generation from moving out of the parental household, particularly during and

immediately after the crisis (Blanco-Romero et al. 2018). Countries with strong government control of public housing, such as the Netherlands (Smits et al. 2014), tend to facilitate independent living; while countries that enable relatively easy and flexible entry into homeownership, such as Sweden, promote entry into a marital union (Holland 2012).

Moreover, as the recent intensification of competition for specialised jobs has led to the prolongation of education (Psacharopoulos and Patrinos 2018), young adults have been spending more years of their lives as dependents in their parents' household. This phenomenon, dubbed 'emerging adulthood' (Tanner and Arnett 2016), specifically refers to individuals aged 18 to 25, whose independence may be further delayed by the need to explore their identities and find their place in the world.

Our results clearly show that the main cross-national variations in living arrangements in Europe are related to the timing of the transition to adulthood. Key events that occur during this time frame in an individual's life course include leaving the parental home, forming a conjugal partnership, and childbearing – all of which shape the individual's propensity to live with their parents, a partner, and/or their child(ren). As multigenerational households remain uncommon in Europe, union formation typically coincides with the departure from the parental home. Higher levels of union instability often lead to single parenthood, which mostly affects women. As fertility has declined and union instability has increased across Europe, co-residence with primary kin has become less common. The modest but stable increase in people living alone might be in part a response to social changes. Future research should explore the specific causes and implications for societies of changes in living arrangements.

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12. Living arrangements in later life

Pearl A. Dykstra

1. INTRODUCTION

How the living arrangements of older adults contribute to their integration into society has long been a topic of sociological inquiry (Rosow 1967). People's living arrangements condition their access to social network ties, which can promote well-being by providing a sense of identity and purpose in life. By exercising social control, such ties can also encourage healthy behaviour (House et al. 1988). Previous research on this topic has focused on the determinants of living arrangements, as well as on the implications of living arrangements for health and well-being in late life. A recurring theme in the literature is that the effects of living arrangements should not be considered in isolation from the life events that created them (Alwin et al. 1985).

Research on the living arrangements of older adults comes under a variety of headings. Starting with Durkheim's (2005 [1897]) work on the family and suicide, these studies have mainly investigated issues such as marital status differences in health (e.g., Gove 1973; Hughes and Waite 2009; Umberson 1992), connections between household composition and access to support (e.g., Burholt and Dobbs 2014; Chappell and Badger 1989), and geographic proximity to family members (e.g., Hank 2007). The majority of these studies have focused on older adults living in private households, while neglecting those living in residential homes and health-care facilities.

Older adults' living arrangements reflect historical and cultural changes in patterns of family life (Thomso 2014). Among the shifts in these patterns that have occurred in recent decades are rising levels of divorce and remarriage; the increased popularity of unmarried cohabitation, including later in life; changes in the ages at which children leave the parental home; and a narrowing of the gap in life expectancy between men and women. Hareven (1982) has described the emergence of increasing individualism in families under the influence of industrialisation, observing that obligations that were once taken for granted are being replaced by a preference for independence and self-actualisation. Greater prosperity facilitates the maintenance of independent households. The connections between ideational shifts, economic developments, and changing patterns of family life are often described by the term 'second demographic transition' (Van de Kaa 1987). Research in this field has shown that the trends towards partnerships becoming less stable and households becoming more complex are now apparent not only in northern and western Europe, where they were first observed, but across the globe. The tempo and the nature of changes in living arrangements are linked to longstanding systems of kinship organisation (Lesthaeghe 2014), which underscores the relevance of regional differences when examining these arrangements.

In this chapter, I discuss trends among older adults in (a) living alone, (b) living with a spouse only, (c) intergenerational co-residence, and (d) living in institutional care. Additionally, I explore the economic factors, public policy arrangements, and cultural shifts that underlie the changes in these patterns, and consider the ramifications of these changes

for individual health and well-being. Throughout the chapter, I draw attention to the ways in which household resources in connection with public provisions and societal prosperity enable people to maintain their dignity and social connectedness late in life.

2. LIVING ALONE

The interest in the issue of older adults living alone among researchers and policy-makers is largely driven by concerns about a possibly vulnerable group in society (Gaymu and Springer 2010; Reher and Requena 2018; Rolls et al. 2010). Such concerns are based on the premise that living alone limits access to webs of interaction and network support. In the literature, there is a tendency to overlook diversity among those living alone, and to overlook evidence of resilience and autonomy (Carr 2019). People who live alone in later life have experienced diverse life courses (Djundeva et al. 2019). Some might never have left the parental home and are currently living alone because they outlived their parents and their siblings live elsewhere. Others might have left home to live on their own and might never have shared a household with another adult. Still others might be living alone because they are widowed or divorced, and their children are no longer living at home. Recognising the diversity of their life courses is crucial to understanding the plight of older adults living alone.

Data compiled by the United Nations (UN) (2017) on the non-institutionalised older population (aged 60+) reveal that around 2010, nearly one in three older people were living alone in northern and western Europe, while around one in four older people were living alone in eastern and southern Europe (see also Liu and Esteve in this volume). Older women were more likely than their male peers to live alone. Shares of solitary living increased with age, given the increasing likelihood of losing the partner by death, and the increasing likelihood of children's departure from the parental home. Thus, in Europe around 2010, more than half of women and one-quarter of men aged 80 or over were living alone. The reason why older women were more likely than older men to be living alone is that they were more likely to be widowed. Data from 10 European countries (Austria, France, Greece, Hungary, Ireland, Portugal, Romania, Spain, Switzerland, and the United Kingdom) allow for comparisons over time, roughly from 1990 to 2010 (United Nations 2017). The share of people aged 60 or over who were living alone increased from 32 per cent to 35 per cent among women, and from 13 per cent to 17 per cent among men. Projections for selected European countries show that converging male and female life expectancies are leading to a decline in living alone among older women in the coming decades, but an increase among older men (Centraal Bureau voor de Statistiek 2018; Martikainen et al. 2019; National Records of Scotland 2018; Office for National Statistics 2018). Interestingly, Keilman and Christiansen (2010) predict that in Norway, the likelihood of living alone will decline for both men and women aged 80 or over. Lower overall mortality and lower excess male mortality are resulting in a drop in the number of widows, and this trend will more than offset the growing number of divorcees at advanced ages (Gaymu et al. 2007).

Explanations for why older people have become increasingly likely to live alone in recent decades fall into three categories: demographic, economic, and cultural (Kramarow 1995). The demographic explanation is that a decline in fertility has reduced the number of adult children with whom older people can share a household (see Skopek in this volume). The economic explanation is that increasing income levels enable independent living. The cultural explanation is that increased individualism, with self-interests gaining precedence over family

obligations, account for the rise in living alone. Obviously, these three explanations are closely intertwined: the decline in fertility has been linked to rising individualism (e.g., Van de Kaa 1987), and rising income has allowed people to act on their growing preference for privacy (e.g., Pampel 1983). In the section on intergenerational co-residence, I provide examples of studies that attempt to disentangle the financial and cultural explanations for the observed trends in living arrangements.

By definition, those who live alone must turn to people outside of their household for help and support. Particularly when they reach an advanced age, and the issue of failing health becomes increasingly pertinent, people who live alone are at risk of having unmet care needs. Findings typically show that compared with their counterparts who are living with a partner, older adults who are living alone are more prone to psychological distress (Henning-Smith 2016), loneliness (De Jong Gierveld et al. 2012), and heavy use of hospital care (Hu et al. 2019). Nonetheless, it is crucial to acknowledge that older people who are living alone are not a uniformly vulnerable group, as many are leading satisfying lives, and are able to rely on friends, family, and community supports to help them manage the challenges associated with ageing. Djundeva et al. (2019) found, for example, that many older people who live alone fare just as well or even better than their peers who live with others, and that only those who have ‘restricted’ networks tend to have poor well-being. Thus, researchers need to be aware of the ways in which presumptions about the disadvantaged position of older adults who live alone might structure the kinds of questions they ask.

Moreover, living alone is a matter of degree. Adult family members might not be living together, but nevertheless quite close: in the same building, street, or neighbourhood. Isengard and Szydlik (2012) refer to this kind of situation as ‘near co-residence’. There are also older people who are ‘living apart together’ (LAT), maintaining an exclusive romantic relationship yet living separately in their own homes (Connidis et al. 2017; De Jong Gierveld 2004). Most have previously had a long-term union, usually marriage, that ended either in the death of the partner or dissolution through divorce. They have chosen a LAT arrangement rather than cohabitation or marriage because it provides them with autonomy, time on their own, and economic independence. Reservations about assuming care obligations are another reason some prefer to LAT.

3. LIVING WITH A SPOUSE ONLY

In their cross-regional comparisons of the living arrangements of the non-institutionalised population, the UN (2017) classified an older person residing in a two-person household with a spouse or a partner as living ‘with spouse only’. In Europe around 2010, 47 per cent of adults aged 60 or over were living with a spouse only. The proportions were higher among men (59 per cent) than among women (39 per cent), and among those aged 60–79 (51 per cent) than among those aged 80 or over (31 per cent). With increasing age, the prevalence of widowhood increases, and, as noted earlier, women are more likely than men to outlive their spouses. Historically, widowhood was the primary pathway out of marriage, yet recent decades are showing an increasing prevalence of divorce in older age groups (Wagner 2020). The proportions of the 60+ population who were living with a spouse only were higher in northern (51 per cent) and western Europe (57 per cent) than in eastern (36 per cent) and southern Europe (42 per cent). In the latter two regions, older adults were more likely to be living with both

a spouse and adult children (for details, see the section on intergenerational co-residence). The findings for the 10 European countries with available data for 1990 to 2010 indicated that over this period, the proportion of older adults living with a spouse only increased from 42 per cent to 49 per cent overall, and from 34 per cent to 41 per cent among women and from 53 per cent to 58 per cent among men. The growth in the proportion of those living with a spouse only was accompanied by decreases in both intergenerational co-residence and the household category ‘other’ (e.g., living with siblings, in skipped-generation households).

Those categorised as living with a spouse only are a diverse group. Although marriage is the most common type of partnership in the older population in Europe (Becker et al. 2019), the proportions of people both young and old who are cohabiting has risen significantly in the last two decades (Thomson 2014). Moreover, as partnerships are increasingly dissolving, more people are remarrying or entering another cohabitation union (Lappegård 2014). In Europe, same-sex couples are increasingly gaining legal recognition, as more and more countries are making marriage and registered partnership available to these couples, or are attaching rights and benefits to same-sex cohabitation (Waaldijk 2017). In sum, it is crucial to acknowledge that older adults classified as living ‘with spouse only’ might not be officially married, nor in a first partnership, nor in a heterosexual relationship.

A plethora of studies have shown that married persons tend to have higher levels of mental and physical health than unmarried persons (for overviews, see, e.g., Roelfs et al. 2011; Simon 2014). Two theoretical perspectives dominate this body of literature. The social causation hypothesis argues that marriage improves health, whereas the social selection hypothesis posits that persons who enjoy better health are more likely than less healthy persons to marry in the first place, and are also less likely to divorce. Sophisticated longitudinal analyses provide greater support for the causation than for the selection hypothesis (e.g., Brockmann and Klein 2004; Musick and Bumpass 2012). With the arrival of large datasets covering full marital histories, scholars have started to analyse the implications of complexity in couple relationships. Recent research has addressed issues such as whether the benefits of cohabitation are akin to those of (re)marriage (Wright and Brown 2017); whether the protection provided by same-sex relationships is similar to that provided by heterosexual unions (Manning and Brown 2015); and whether the gains associated with union formation are similar in magnitude to the losses associated with union disruption (Kalmijn 2017). The majority of the studies on this issue have been based on data from the United States, and most have focused on earlier stages of the life course.

As Brown and Wright (2017) have noted, family scholars are only beginning to investigate the implications of the new complexity in later life couple relationships. In a praiseworthy study carried out in the Netherlands, Chen and Van Ours (2018) tracked continuity in partnerships, as well as entry into and exit from partnerships, among ‘younger’ (born after 1962) and ‘older’ (born in or before 1962) cohorts over a period of five years, while distinguishing between opposite-sex and same-sex partnerships. Their findings revealed that being married (whether to a person of the opposite sex or of the same sex) resulted in larger happiness gains than being in a consensual union (whether with a person of the opposite sex or with the same sex). Marriage improved mental well-being in both younger and older cohorts, but cohabitation benefitted the younger cohort only. The well-being effects of partnership formation and disruption were symmetric, meaning they had similar magnitudes but were in reverse directions: partnership formation had positive effects, whereas partnership disruption had negative effects.

There are reasons to believe that the mechanisms linking partner status and health differ between older and younger persons. First, the protective effects of unmarried cohabitation may be weaker later in life (King and Scott 2005; Moustgaard and Martikainen 2009). Whereas unmarried cohabitation often follows a previous union among older adults, it is more likely to be a prelude to marriage among younger adults. Compared with those who have been continuously married, older people who cohabit may have accumulated fewer health and wealth benefits given the shorter duration of their unions. Of course, weaker feelings of attachment and commitment may also underlie the lower levels of investment in the union (Wright and Brown 2017). Consistent with these observations, survival analyses using longitudinal data from England and Wales have revealed that at younger ages, cohabiting and married persons had similar mortality levels; but that at older ages, cohabitators had elevated mortality levels (Franke and Kulu 2018). It should, however, be noted that rather than reflecting age differences, these findings might be the result of historical changes in the meaning of cohabitation (Manting 1996).

Second, due to increasing morbidity, the force of health selection into divorce and remarriage may be accentuated in later life (Zulkarnain and Korenman 2019). Moreover, compared with younger people, older people may be less able to offset the economic shocks of divorce by expanding their working hours, retraining, or moving to places where the labour market conditions are more favourable. The loss of close network ties due to divorce may be a greater concern for those who have retired than for those who are still working. In line with these arguments, a recent longitudinal analysis using data from the United States showed that the existing models of adjustment to divorce did not characterise the experiences of middle-aged and older adults (Lin et al. 2019). Their findings suggested a slow, gradual recovery from union dissolution, which is not consistent with either the ‘temporary crisis’ or ‘chronic strain’ models that have been differentiated for divorce in earlier work.

4. INTERGENERATIONAL CO-RESIDENCE

The prevalence of intergenerational co-residence (older persons living with adult children) varies markedly across European regions (United Nations 2017). Around 2010, it was lowest in the western and northern subregions, at 9 and 13 per cent, respectively; and it was relatively high in the southern subregion, at 30 per cent. Data that allow for the estimation of levels of intergenerational co-residence in eastern Europe were not available in the UN databases. However, the European Union Statistics on Income and Living Conditions (EU-SILC) 2008 reported levels in eastern Europe that were generally similar to those in southern Europe (Iacovou and Skew 2011). It should be noted that the EU-SILC household and age categories differed somewhat from the UN definitions. In general, around 2010, the propensity for intergenerational co-residence was similar for older men and women (UN 2017), and was higher for persons aged 60–79 (21 per cent for women, 22 per cent for men) than for persons aged 80 and over (20 per cent for women and 15 per cent for men).

Levels of intergenerational co-residence decreased over time, from 26 per cent around 1990 to 20 per cent around 2010 (UN 2017). As was pointed out earlier, the decline in the proportion of older people who were living with their adult children was accompanied by increases in the proportions of older people who were living with a spouse only and who were living alone. The trend away from co-residence has not been monotonic, as economic and political dis-

ruptions have led to some reversals. For example, the financial recession that started in 2008 resulted in higher levels of co-residence in a number of European countries because increasing numbers of young adults were unable to afford residential independence (Aassve et al. 2013). In former socialist countries, housing shortages, high prices, and precarious incomes have necessitated intergenerational co-residence (Robila 2004).

Co-residence can result from very different life course trajectories, each of which has its own specific determinants (Smits et al. 2010). In some cases, adult children may have taken in their ageing parents in order to care for them; while in other cases, the adult children may never have left the parental home, or might have returned home after experiencing setbacks in marriage or employment (Mitchell 2006). Intergenerational co-residence might be the most preferred and feasible living arrangement, or it may simply be the default living arrangement (Lennartz et al. 2016). Therefore, to understand cross-national differences in levels of co-residence, it is crucial to focus on a wide range of factors in addition to residential preferences, including the financial resources of the young adults and the seniors, as well as the economic circumstances, the housing market, and the availability of affordable public residential and home care in their country of residence.

Scholars have employed creative research designs to disentangle cultural and financial determinants of co-residence. Manacorda and Moretti (2006), for example, carried out a natural experiment in Italy to test whether greater parental wealth was devoted to prolonging co-residence. The underlying assumption was that Italian parents value family togetherness rather than intergenerational independence. The authors showed that an increase in fathers' income linked to changes in the Italian Social Security System resulted in a higher proportion of young men living at home. Apparently, wealthy parents 'bribed' their children to remain at home, offering comfort in exchange for their children's presence. Contrary to the standard explanation that a combination of economic necessity and housing shortages underlies intergenerational co-residence (Newman 2012; Ruggles 2007), Manacorda and Moretti demonstrated that financial resources enabled Italian parents to act on their cultural preferences. Giuliano (2007) focused on the living arrangements of immigrants under the assumption that if cultural norms are persistent, then the living arrangements of immigrants to the United States should parallel those of their counterparts in the home country. Using data from both 1970 and 2000, the study showed that the proportions of 20–34 year olds still living with their parents were higher among immigrants of southern European origin than among immigrants of northern European origin. The duplication of the European patterns in the United States suggests that culture played a major role in determining living arrangements.

For older adults, the potential benefits of co-residence include having access to intrahousehold companionship, emotional and practical support, and economies of scale (Hughes and Waite 2002). The potential disadvantages are reduced autonomy, stress resulting from possible intrahousehold conflict, and, in some cases, overcrowding (Gove et al. 1979). To gauge the balance of positive and negative effects, it is important to consider individual resources, such as health and socio-economic status, the availability of support outside the household, and the motives for co-residence. It has been suggested that the impact of co-residence on older adult well-being might vary across European regions (De Jong Gierveld et al. 2012). In northern and western Europe, where the residential independence of family generations is valued, co-residence may be associated with lower well-being; whereas in eastern and southern Europe, where multigenerational households are the traditional institutional arrangement, co-residence might be associated with greater well-being.

Findings on the association between intergenerational co-residence and older adult well-being have not uncovered a clear regional divide. Courtin and Avendano (2016) revealed that parents who were living with an adult child reported fewer depressive symptoms than parents who were not living with an adult child, but small sample sizes prevented them from deriving any conclusions regarding regional variations. Moor et al. (2013) found that parents with resident children and those with non-resident children were equally satisfied, and that this association did not vary across European countries. A study carried out by Grundy and Murphy (2018) showed that in all regions, widows were generally happier if they were living with their children than if they were living alone; but also that in eastern and southern Europe, only living with a daughter had this positive effect. Aranda (2015) found that ‘doubling up’ (two or more generations in the same household) had no impact on parental depression in Nordic or western European countries, but that it decreased depressive symptoms for parents in southern European countries. Differences between the studies in terms of the age ranges of the parents and the adult children, and in terms of the years of data collection, make comparisons difficult. De Jong Gierveld et al. (2012) pointed out that the direction of intrahousehold transfers should be considered, rather than co-residence only. In both eastern and western Europe, older adults who were primarily on the receiving side of transfers tended to have the lowest well-being.

5. LIVING IN INSTITUTIONAL CARE

Cross-national comparisons of the institutionalised older adult population are generally based on the number of available beds in residential long-term care facilities per 1000 adults aged 65 or over (Organisation for Economic Co-operation and Development 2019). In 2017, this figure ranged from two per 1000 in Greece to 83 per 1000 in Luxembourg. An overview of the changes in the number of beds in these facilities between 2005 and 2017 in 23 European countries reported a decrease in the Czech Republic, Finland, France, Iceland, the Netherlands, Norway, Poland, Sweden, Switzerland, and United Kingdom; an increase in Estonia, Germany, Italy, Lithuania, Slovakia, and Spain; and little change in Belgium, Denmark, Hungary, Ireland, Italy, Latvia, and Slovenia (Dykstra and Djundeva 2020). The overall trend was one of ‘limited convergence’ (Ranci and Pavolini 2013, p. 312): the more generous welfare regimes retrenched their provisions, while the less generous welfare regimes expanded theirs.

Some of the reductions in public provisions were the result of countries implementing policies to move long-term care out of residential facilities and into the community (Colombo et al. 2011). The driving forces behind this shift were not just a desire to contain costs, but an effort to satisfy people’s demands to choose the care arrangements and services they prefer (Verbeek-Oudijk et al. 2014). Expansions of public provisions came in the form of new entitlements, but were also aimed at supporting the caring role of families. Throughout Europe, there has been a trend towards the re-familialisation of care; that is, shifting responsibility for long-term care from the state to individuals and their families (Ranci and Pavolini 2013). Both ‘passive’ (i.e., withdrawal by the state) and ‘active’ (i.e., the introduction of cash for care benefits) re-familialisation measures have been implemented (Leibetseder et al. 2017). In addition, there has been a trend towards the marketisation of care, in which those in need of long-term care receive publicly funded services from private providers or pay for services out-of-pocket, with some financial compensation being provided through tax rebates (Ranci

and Pavolini 2013). Re-familialisation and marketisation increase the risk of a dualisation of care (Szebehely and Meagher 2018), whereby high-resource older adults are able to access the best providers, and low-resource older adults are faced with declining service coverage.

Deinstitutionalisation is not a problem per se, but it can become one if it is not matched with a sufficient increase in access to affordable home care and community care services (Spasova et al. 2018). The shift towards more home care and less residential care is in line with efforts to enable older people to 'age in place' (Pani-Harremman et al. 2020); i.e., to live independently in their own homes for as long as possible. There is a crucial distinction, however, between 'ageing in place' and simply 'staying put' (Boldy et al. 2011). Services must be available that enable older people to live well in their own 'place'. Moreover, for older people whose housing conditions are poor, their home is not an appropriate environment to 'age in place'. Trying to cope at home for too long can result in great harm, leading both older people and their carers to become physically and mentally exhausted (Horner and Boldy 2008). Coordination between multiple care providers is necessary to ensure that older adults living in the community are not left unnoticed or unassisted.

6. CONCLUSION

Across Europe, several consistent trends in the living arrangements of older adults have emerged. Most notably, there has been a rise in recent decades in the proportions of people over the age of 60 who are living alone, or who are living with a spouse only. In the future, women throughout Europe will be more likely to have a spouse to support them if they become dependent (Gaymu et al. 2007). Trends in intergenerational co-residence and institutional living have shown greater variation. The steady decline in the proportions of older adults who are sharing a household with their adult children reversed under the influence of the economic crisis, particularly in countries where the financial independence of younger generations was hit most hard. In countries where residential care was previously widely available, but public spending on such care has been reduced, the prevalence of institutional living has decreased. Moreover, in countries where residential care was virtually non-existent, but government expenditure has expanded, the prevalence of institutional living has increased.

Estimates of trends in living arrangements provide important insights into the availability of social support, and they are also significant predictors of material living standards (Martikainen et al. 2019). Administrators base their projections of needs for housing, health care, energy, and transport on such estimates. While the value of examining living arrangements should be recognised, the limitations of such research should also be acknowledged. Snapshot descriptions of trends can overlook the diversity in the pathways that culminate in particular living arrangements. Taking this diversity into account can help us better understand the links between well-being and living arrangements. For example, among older people who are living alone, those who are divorced or widowed seem to be particularly prone to psychological distress. By contrast, permanently single older persons do not seem to face a greater risk of psychological distress than their currently married counterparts (Hank and Wagner 2013). Presumably, those who have always lived on their own after leaving home have become accustomed to fending for themselves. They have also not experienced the marital disruption of divorce or spousal loss.

A focus on living arrangements also fails to adequately portray the exchanges of support between older persons and their kin. It helps to consider intrahousehold exchanges to gain an understanding of why having a partner does not per se contribute to greater psychological well-being. For example, Hank and Wagner (2013) have shown that only those married people who report being satisfied with the extent of reciprocity in their marriage report fewer depression symptoms than their unmarried peers. Moreover, spouses are not always a source of support, but on the contrary, might require intensive care in the event of disability. The emotional, financial, and physical costs of spousal caregiving are well reported in the literature (Wagner and Brandt 2018). Finally, when parents and adult children share a household, the direction of intergenerational transfers is not always clear (Cohen and Casper 2002). Who is supporting whom? Often, co-residence serves to benefit the adult children rather than the other way around (Wiemers et al. 2017).

In addition, it is crucial to ‘look beyond the household’ (Grundy et al. 1999) to document transfers and get-togethers of older adults and their relatives who are living independently of one another. Most older adults live within easy reach of their kin and, contrary to the general assumption of an increasingly mobile society (Cooke and Shuttleworth 2018), there is no evidence showing increased distances between adult children and their ageing parents in recent decades (Geurts et al. 2014; Lundholm and Malmberg 2009; Steinbach et al. 2020). Modern technology presents a new range of possible options for keeping in touch, making living arrangements less relevant as an indicator of social isolation or support.

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PART V

FAMILY TRANSITIONS IN THE LIFE COURSE

13. Partner choice and partner markets

Jan Van Bavel

1. INTRODUCTION TO CONCEPTS AND TERMINOLOGY

Partner choice represents a crucial stage in the process of family formation, and plays a key role in the reproduction of socio-economic and cultural inequality, in the development of kinship bonds, and in the enactment of gender. Given its intricate links with broader societal shifts, partner choice represents a particularly exciting area of study, not just for family sociology and demography, but for sociology in general. The term ‘partner choice’ is used interchangeably with the terms ‘mate choice’ and choice of a ‘romantic partner’ (Lewis 2016; Schwartz 2013). The adjective ‘romantic’ connotes that the partner is chosen based on passionate mutual affection. While cross-cultural studies have suggested that passionate or romantic love is likely to be a human universal (Fisher et al. 2006; Jankowiak and Fischer 1992), it appears that romantic love did not become a normatively expected basis for marriage until the nineteenth century, particularly in Western societies (Coontz 2005; De Munck et al. 2016). This review, like most work in sociology and family demography, focuses on long-term partnerships that may lead to household formation and, potentially, to joint childrearing, rather than on short-term sexual relationships without any commitment. Partner choice encompasses situations in which partners are still living apart, living in unmarried cohabitation, or living together as married spouses. While the main focus of this chapter is on heterosexual relationships, same-sex partner choice is an emerging issue that is discussed in the final part of this chapter (see also Evertsson et al. in this volume). Moreover, the analysis focuses on partnerships that are expected to be monogamous at a given point in time. Polygamy (the practice of having multiple spouses at the same time), either in the form of polygyny (a man having more than one wife) or polyandry (a woman having more than one husband), is not discussed.

There is considerable evidence that *assortative mating* is pervasive (Lichter and Qian 2019; Schwartz 2013). This concept denotes the fact that matches do not occur at random, as partners are sorted based on sharing a number of traits. The concept of *endogamy* refers to the tendency of people to select a partner within their own social group, while *exogamy* refers to choosing a partner outside of one’s own group (also called *intermarriage*; e.g., between religious groups). The distinction between endogamous and exogamous unions is used to indicate differences or similarities in qualitative group characteristics such as geographic origin, religious denomination, or ethnic background. Alternatively, the concept of *homogamy* refers to the tendency of people to choose a partner who has status characteristics close to their own that can be ordered or quantified, such as income, educational attainment, or socio-economic status. The unions of partners who are far apart in terms of such characteristics are called *heterogamous*. When an individual has a partner with higher status (‘partnering up’), the concept of *hypergamy* is used; whereas when an individual has a partner with lower status (‘partnering down’), the concept of *hypogamy* is applied. When qualifying unions, the wife is often used as a reference person: i.e., when the female partner has partnered up, the union is called hyperga-

mous; and when the female partner has partnered down, the union is called hypogamous (De Hauw et al. 2017; Esteve et al. 2016; Van Bavel et al. 2018).

2. THE MARKET APPROACH TO PARTNER CHOICE

In family sociology and demography, the most common theoretical tool for studying partner choice is to approach it as a market with a supply side and a demand side (Blossfeld and Timm 2003; De Graaf and Kalmijn 2003; Kalmijn 1998; Qian and Lichter 2018; Schmitz 2017; Schwartz 2013). While it was standard in the past to talk about the *marriage market*, it is now becoming more common to talk about the *partner market* to reflect the reality that partner choice is not limited to the choice of a marital partner. The concept of the market places those making the deal at centre stage. Trades on the market consist of matches based on two-sided decisions: both parties involved need to agree to form a partnership. However, using the concept of the market does not necessarily imply that matching decisions are expected to be rational; i.e., that decision making is guided by the maximisation of some kind of utility function. While the market approach does imply that individuals are engaged in some form of conscious decision making about whom to partner with, it does not assume that those involved are conscious of all of the factors that affect such decisions.

2.1 Needs, Preferences, Opportunities

The analysis of partner choice from a market perspective can be structured along three dimensions: first, the *needs* or desires an individual hopes to meet by entering the partner market and finding a partner; second, an individual's *preferences* for partners with certain traits; and, third, the *opportunities* (or barriers) an individual has to gaining knowledge about potential partners (also called *search costs*). As all three of these factors are inherently and profoundly affected by cultural and gendered beliefs, values, and norms, they vary not just between individuals and men and women, but between societies over time and space.

First, having a partner may fulfil an individual's *needs* for affection, support, kinship, offspring, and economic security; and the greater these perceived needs are, the higher the individual's inclination to look for a partner is likely to be. Not everyone is interested in entering the market to find a partner. In some societies, the pressure to live one's adult life in marriage is very strong, and adults who never marry are pushed to the margins of such cultures. In other societies, people may feel more freedom to decide whether to enter a union, or the pressure to marry may be more subtle (Hertel et al. 2007). Those who are already engaged in a relationship are usually normatively not supposed to be on the market. Nevertheless, even those individuals whose explicit level of need to find a partner appears to be low could decide to enter a new (maybe adulterous) relationship. In other words: who is and who is not 'on the market' for union formation is not clear-cut. This is a complicating factor researchers face when they are attempting to delimit a relevant sample for an empirical analysis of partner choice. Just like people visiting a city might end up buying things they were not looking for, people who do not feel the need to find a partner may end up entering a new relationship.

Second, agents on the partner market are supposed to have *mate preferences*; i.e., when considering potential partners, they like some traits more than others. Given that matching decisions on the partner market are two-sided, in heterosexual partner choice, the preferences

of one sex define the *attractiveness* of the other sex. Thus, distinguishing between needs, preferences, and opportunities in mate choice is equivalent to using the concept of attractiveness for the second factor. The concept of *marriageability* has also often been used as an equivalent term (Lichter et al. 1992): i.e., people with desired traits, like those having a steady income, are then designated as being more marriageable.

Third, as people will never be able to meet all potential partners, they have limited meeting *opportunities*, and thus face *constraints*. A closely related concept is that of *search costs*: i.e., people are aware of the characteristics of only a small sub-sample of everyone who is on the partner market, and gathering more relevant information about more people will entail some costs (defined broadly to include social and psychological as well as monetary costs). Search costs arise because partner markets are not frictionless (Lichter et al. 1992). An individual's opportunities to learn about potential partners, as well as his/her search costs, are affected not just by his/her cultural context, but also by factors related to geography, social structure, and demography. Geographic propinquity still plays a key role (Haandrikman et al. 2008), even in online dating markets (Bruch and Newman 2019), which have expanded tremendously since the beginning of the twenty-first century (Potârca 2017).

In terms of social structure, schools and colleges play an important role in structuring opportunities to meet potential partners for young people, and workplaces structure similar opportunities for adults who have entered the labour market (Kalmijn and Flap 2001; McClendon et al. 2014; Sweeney and Cancian 2004). An individual's opportunities to meet a partner with the same qualifications are strongly dependent on his/her level of educational attainment, because educational systems involve a stepwise selection process. The lower educated enter the labour and marriage market at earlier ages, when social networks tend to be more heterogeneous. In contrast, individuals with advanced education tend to enter increasingly homogeneous groups that are filtered in terms of educational qualifications. Thus, the likelihood of educational homogamy in a partnership increases significantly with the partners' educational attainment (Blossfeld and Timm 2003).

Finally, the demographic composition of the partner market affects meeting opportunities and search costs as well. Demographic shortages of suitable partners not only lowers the probability of finding a match, it influences the characteristics of the partners if a match does occur (Choi and Tienda 2017; Lichter et al. 1995). The concept of the *partnering or mating squeeze* (De Hauw et al. 2017; Van Bavel et al. 2018) – which is derived from the concept of the marriage squeeze (Schoen 1983), and has been expanded to include partnership formation outside marriage – is intended to capture this effect of demography: when the number of people with desired traits (e.g., opposite-sex age peers) in the partner market is low, the search costs will be higher and the meeting opportunities will be more limited.

The concept of the partnering squeeze points not only to the role of opportunities, but also to the influence of age preferences. Indeed, partnering markets are clearly age-structured with respect to preferences as well as to opportunities. The available evidence suggests that heterosexual women tend to prefer men who are the same age or a bit older than themselves, but typically not more than 10 years older; while men tend to prefer women who are in their mid-20s, regardless of their own age (Buss and Schmitt 2019; England and McClintock 2009; Grøntvedt and Kennair 2013; Skopek et al. 2011b). The preferences of the opposite sex clearly affect the likelihood of finding partners with increasing age: i.e., it is more challenging for older women and for younger men to find partners (Kolk 2015).

Opportunities to meet potential partners are structured by age as well. When rates of divorce and separation were still low, dating opportunities were typically focused on adolescent and young adult people, at, for example, schools and colleges, clubs, and weekend parties. Hence, the age range of union formation was strongly centred on the mid-20s. As unions have become increasingly unstable and marriage and cohabitation are increasingly postponed, union formation has become much more spread out across the older adult ages (Buchmann and Kriesi 2011; Sassler 2010). As a result, new sites have emerged that provide older singles with the opportunity to meet potential partners outside of more traditional meeting spots like the workplace or the neighbourhood, such as singles-only holidays and after-work parties. The expanded age range of the partnering market has also boosted the rise of online dating (McClendon 2018; Rosenfeld et al. 2019).

The actual matching process depends on the interplay of needs, preferences, and opportunities. This interplay is dynamic in that all three factors may change over historical time, as well as over the life course. For example, if people experience an improvement in their earnings prospects on the labour market, they may feel less of a need to enter marriage to seek economic security. Accordingly, women's increased educational and labour market participation levels have allowed women to postpone union formation, and to wait until they find an attractive partner (Oppenheimer 1988). People may update their preferences as a result of their experiences on a constrained partner market (Grow and Van Bavel 2015; Lichter et al. 1995). Opportunities to meet different kinds of people can and often do change, such as when young adults leave their hometown to pursue advanced education.

In practice, people do not usually find 'the perfect match' that maximises the fit between the actual traits of their chosen partner and their ideal mate preferences. Due to time constraints, limited meeting opportunities, competition on the partner market, and the limits of one's own attractiveness, people will usually settle for a match that is sufficiently good, rather than attempting to maximise the fit between the actual and the desired mate characteristics. This phenomenon of choosing an option below the maximum but above a threshold of acceptability is called *satisficing* (Todd and Miller 1999). The acceptability threshold is dynamic, as it will change based on earlier experiences. To the extent that the pressure to find a mate increases with age, the threshold is also expected to fall with age (Todd et al. 2005).

The influence of significant others such as family and friends (also called 'third parties'; Kalmijn 1998) on partner choice varies between societies and social groups, but will always be channelled through needs, preferences, and opportunities. *Arranged marriages* represent one extreme on a scale reflecting the extent of third-party influences on a match, in which the parents or the wider families are involved in setting up the matching opportunities in accordance with their familial preferences, rather than using the preferences of the matched individuals as the main guideline. But even in online dating, third-party influences are present through the habitus brought to the digital meeting site by online daters as fully socialised subjects (Schmitz 2017).

2.2 Matching, Competition, and Exchange

A key challenge of research on partner choice is disentangling the influence of partner preferences on the one hand, and constrained opportunities on the other (Lichter et al. 1995). Theoretically, there are several ways to explain the observation that most matches tend to be homogamous with respect to social features such as educational attainment. According to the

matching mechanism, homogamy emerges because of homophily; i.e., people tend to prefer partners with similar qualities. According to the *competition* mechanism, people compete with others to find a partner who preferably has *more* of some desired quality. If both sides of the market prefer more of some characteristic in their partners, and given the competition on each side of the market, then everyone ends up with someone roughly similar to him/herself, since nobody wants to ‘partner down’. Whether matching or competition prevails may depend on the trait considered (Schwartz 2013), and on the societal context. The existing evidence suggests that in modern Western societies, both men and women tend to prefer partners who are similar to them in terms of educational attainment, but, all else equal, also have high earning prospects (Grow and Van Bavel 2015, p. 5). Moreover, the matching mechanism clearly prevails with respect to endogamy based on ethnicity and religious background (Schwartz 2013).

Whether matching or competition predominates may also depend on gender. This appears to be the case with respect to *age homogamy*; i.e., the very persistent pattern that partners tend to be about the same age, but with the male partner usually being a couple of years older than the female partner (Van de Putte et al. 2009). While older men tend to prefer younger female partners, women tend to prefer men of about the same age or even a bit older (Kolk 2015). However, most older men will not be able to find a mid-20s female partner, as they will face competition from younger men. Hence, while matching explains age homogamy for women, competition may explain it for men – with the male partner typically being a bit older. *Age heterogamy* is generally higher in higher-order unions: after separating from their previous partners, the age differences between male and female partners tend to be greater (Qian and Lichter 2018).

While matching and competition usually generate couples who have similar traits; *exchange*, a third mechanism, tends to generate couples who are unequal on a given characteristic. People on one side of the partner market may combine attractive traits with features that are less desired by the other side of the market, and vice versa (Kalmijn 1998). Therefore, a complementary match could be made if ego has desired feature A but lacks B, while alter has a lot of B but lacks A. Exchange occurs when individuals trade such qualities, which will only happen if both traits are valued and are in some way considered substitutable (McClintock 2014; Qian and Lichter 2018). While exchange generates couples who have complementary traits (for example, when a high-earning female professional with long working days marries someone with low earning potential but lots of time and willingness to take care of housework and children), matching and competition forge supplementary matches (for example, when two high-earning individuals get married and pool their incomes, potentially reinforcing income inequality between households).

Since needs, preferences, and opportunities are strongly gendered (and play a role in sexual selection as an evolutionary force in human biology, Buss and Schmitt 2019), the literature mentions cross-trait exchange as an important mechanism in heterosexual partner choice. Most common is the assertion that men may find a so-called ‘trophy wife’ by exchanging high socio-economic status for other desirable resources, such as beauty and youth, as well as homemaker and childcare skills (Gullickson 2017). To the extent that people attribute a hierarchy to racial or ethnic groups, ethno-racial differences may be involved in exchanges as well, such as when poorer women from ethnic minorities partner with richer men of the majority group, or when lower-status white women partner with higher-status black men (Choi and Tienda 2017; Sassler and Joyner 2011). Marriage order appears to be a trait valued for exchange as well: never-married individuals are in a better position than previously married

individuals to marry more attractive partners. This holds particularly for women (Qian and Lichter 2018). Even though matching and trading are competing forces, they are not mutually exclusive. Some couples may match on a given set of traits, while others engage in a cross-trait exchange (McClintock 2014).

3. EMERGING TOPICS

3.1 Gender Equality and Gender Inequality

The late twentieth-century reversal of the gender gap in education to women's advantage has inspired a surge of scholarly interest in heterosexual partner choice, which is an important mechanism in the reproduction of gender inequality (Van Bavel 2012; Van Bavel et al. 2018). A key question is to what extent gender inequality in partner choice is weakening. The expanded participation of women in education and the labour market makes them less dependent on men to secure their economic well-being, leading to a convergence in partnering *needs*. The same trends also affect meeting *opportunities*, as men and women are now more likely to share mixed-gender schools, colleges, and workplaces – even though the choice of study subject and occupation remains strongly gendered (Sweeney and Cancian 2004; Van Bavel et al. 2018). More equal meeting opportunities may also explain convergence in gender-specific divorce trends and re-partnering opportunities after divorce (Grow et al. 2017; Schnor et al. 2017). Finally, there is evidence suggesting that male and female mating *preferences* are also converging, even though clear sex differences remain (Zentner and Eagly 2015). The extent of such convergence is a matter of debate. Evolutionary theory predicts that complete gender equality in partner preferences is unlikely to occur, since mate choice is linked with sexual selection as an evolutionary force (Buss and Schmitt 2019).

Homogamy remains the most common pattern, but the reversal of the gender gap in education has made educational hypogamy more common than hypergamy (De Hauw et al. 2017; Esteve et al. 2016). However, what this tells us about mate preferences is unclear, as disentangling the effects of needs, opportunities, and preferences remains methodologically challenging. Marrying 'down' in terms of education does not necessarily mean that women no longer prefer high-status men, as hypogamy may hide the maintenance of more traditional matching patterns on other dimensions such as occupational status or income (Van Bavel et al. 2018). Qian (2017) interprets the observation that husbands still make more money than wives, even when the latter are more educated, as evidence that educational hypogamy does not challenge the higher status of men, as income, rather than education, is used as the main status marker. Still, the educational reversal has increased the relative earnings of women in couples (Van Bavel and Klesment 2017), and has made female breadwinners more common than they were in the past (Klesment and Van Bavel 2017; Vitali and Arpino 2016). Even Qian's (2017) evidence for the United States (US) shows that the tendency of women to marry up in income has declined since the 1980s. As Van Bavel et al. (2018) explained, the finding that women still 'partner up' in income does not need to follow from a preference to avoid status reversal. Rather, given that women continue to earn less than men, on average, it is consistent with a situation in which women and men alike prefer partners with good economic prospects (Grow and Van Bavel 2015).

3.2 Same-Sex Couples

Both the legal rights and the visibility of same-sex couples have increased in recent decades, as witnessed by the growing number of nations that accommodate same-sex marriages (Paternotte 2015). While there has been an expansion of social science research on families headed by same-sex couples since the start of the twenty-first century (Biblarz and Savci 2010), the number of studies that have addressed same-sex partner choice is still very limited. This may be due in part to the fact that identifying same-sex couples in conventional data sources has been difficult (Andersson et al. 2006; Evertsson et al. in this volume; Festy 2007).

As to the demography of partner choice, the evidence so far indicates that, on average, the partners in same-sex households are older, and the age gap between the partners is larger, than in households headed by heterosexual partners. Homosexual men appear to be more likely to enter registered partnerships than homosexual women (Anderson and Noack 2010; Cortina et al. 2012), but this does not hold in all countries where same-sex partnerships are legally recognised (Chamie and Mirkin 2011). In Norway and Sweden (Andersson et al. 2006), and in Canada and Spain (Cortina et al. 2012), same-sex partnerships, and especially gay partnerships, are more likely to involve a foreign-born partner than heterosexual partnerships. US data show that same-sex couples tend to be less homogenous than different-sex couples on several characteristics, including ethnicity, age, and education (Jepsen and Jepsen 2002; Schwartz and Graf 2009).

In many societies, same-sex relationships are marginalised, which may encumber people's intentions to enter long-term same-sex relationships. Potârca et al. (2015) have shown that the normative and legal-institutional legitimisation of same-sex unions is associated with the long-term partnering preferences of gays and lesbians. In supportive contexts, their partnering preferences are more likely to prioritise long-term relationships and monogamy than in contexts in which same-sex unions are more marginalised. Overall, compared with gay men, lesbians tend to believe more strongly in the importance of monogamy; but in contexts in which same-sex marriage is legally recognised, gay men tend to distance themselves from the stereotype of being prone to short-term relationships (Potârca et al. 2015).

The opportunities to meet potential partners differ in important ways. Unlike heterosexual individuals, gays and lesbians cannot assume that most people they meet will share their sexual orientation. Because of the limited size of the partner market, and given that sexual orientation is generally not visible in daily life, gay and lesbian people have long been more prone than heterosexual people to use non-traditional means for finding a partner, such as internet dating. The internet enlarges the opportunities to get in touch with a wider variety of people of similar sexual orientation, which is particularly beneficial to people facing thin dating markets (Potârca et al. 2015; Rosenfeld et al. 2019). Gay men and lesbians tend to be geographically more mobile than heterosexual individuals, and are more likely to live in large urban centres (Anderson et al. 2006), which may reduce third-party influences from family and other relatives (Schwartz and Graf 2009).

Apart from the preference for a same-sex or a different-sex partner, there appear to be many similarities between the mate preferences of homosexual and heterosexual people. Regardless of their sexual orientation, most individuals seek in a partnership affection, dependability, shared interests, and similar values and (religious) beliefs. Moreover, men, regardless of their sexual orientation, are more likely to emphasise a partner's physical attractiveness; while women, regardless of sexual orientation, tend to put greater emphasis on personality traits

(Peplau and Fingerhut 2007). Like heterosexual men, gay men exhibit preferences for partners who are younger than themselves (Burrows 2013). Another US study found that gay men and lesbians alike rate intellect, pro-social behaviour, and family-oriented characteristics as desirable in potential partners, but tend to value these characteristics more in long-term than in short-term sexual relationships, which is also in line with findings for heterosexual people (Regan et al. 2001).

3.3 Online Dating

In the twenty-first century, the internet has become a widely accepted channel for finding a partner, weakening the role of family and friends (Hobbs et al. 2017; Potârcă 2017; Rosenfeld et al. 2019). An emerging stream of research addresses to what extent online dating is changing the partnering market. The current evidence indicates that those who go online to seek a partner are a somewhat selective part of the general population. They tend to be more highly educated and have higher incomes than the overall population (Hitsch et al. 2010), and those who report finding a long-term partner online tend to have less extraverted personalities (Danielsbacka et al. 2019). As to the reasons for this selectivity, there are two opposing hypotheses. According to the *compensation hypothesis*, individuals who face difficulties meeting a partner through more traditional channels go online to compensate for deficits encountered offline. According to the *Matthew effect* hypothesis, online dating causes the rich to get richer, as it is mostly used by individuals who already have strong dating skills, and who use the internet as an additional partnering tool. So far, the evidence of which hypothesis is more accurate is mixed. Some studies have supported the Matthew effect, but a recent study in Germany found that extraverted people are less likely to have found their current partner online. This latter finding is more in line with the compensation hypothesis, which argues that more timid individuals tend to use online dating to compensate for a lack of extraversion in face-to-face situations (Danielsbacka et al. 2019).

It is clear that the internet is massively expanding the opportunities to get in touch with potential partners. The use of explicit criteria in searches enhances the efficiency of the partner search, which should be particularly beneficial to individuals who face thin dating markets (Rosenfeld and Thomas 2012). More generally, if mate preferences are homogamous and endogamous, using explicit criteria to search a large database of potential partners could facilitate matches between partners with similar traits (Hitsch et al. 2010). On the other hand, by providing a large, flexible, and diverse supply of potential mates in a setting that can be accessed in relative anonymity, online dating may be perceived as being less tightly structured than traditional institutionalised arrangements due to the absence of direct third-party influences. It is possible that the anonymity of internet dating facilitates a less constrained pursuit of mate preferences, with preferences being more decoupled from individual resources (Potârcă and Mills 2015).

Consistent with the latter hypothesis, a study based on data from Germany and the US suggested that the internet may promote weaker educational, ethnic, and religious endogamy than more traditional meeting contexts such as schools and gatherings of friends, and family (Potârcă 2017). Nevertheless, the mechanisms that cause homogamy and endogamy to be the dominant patterns in mate choice clearly work on the internet as well. A study based on German data has shown that educational homophily is a dominant force in online mate choice (Skopek et al. 2011a). After controlling for the opportunity structure on the online platform,

the preference for similarly educated partners appears to be a major factor, especially among women. There is, for example, evidence that women are highly reluctant to contact partners with educational attainment lower than their own (Skopek et al. 2011a).

Apart from examining the specificities of online dating, scholars have been using data from internet platforms to shed new light on puzzles that have not yet been solved with conventional data about couples (Hitsch et al. 2010; Skopek et al. 2011a, 2011b). For example, Lewis (2016) found that both the matching (preference for similarity) and the competition (preference for higher status) mechanisms play a role in explaining homogamy in ways that are not always symmetrical between men and women. The same US study also showed that similarities in socio-demographic characteristics are to some extent by-products of a preference for interpersonal compatibility (shared values, activities, and looks), but that many of the effects of these similarities are independent.

Overall, recent studies also imply that, fundamentally, dating in the online world is structured in similar ways to dating in the offline world, as traditional social conditions found offline are reproduced online. Online daters exhibit categories of perception and sets of mate preferences that correspond systematically with their position in the (offline and online) partner market, and in society at large (Bruch and Newman 2019; Schmitz 2017). For example, empirical research indicates that ethno-racial preference hierarchies are similar in online and offline dating (Potârca and Mills 2015). There is no evidence that dating apps and internet dating are transforming partner choice and the partner market into a kind of individualised marketplace for entertainment where users can always return ‘for another bout of shopping’ (Bauman 2003, p. 65). Instead, the existing research suggests that most individuals go online to seek romantic love and monogamy, and are committed to longer-term relationships. Accordingly, the technology is evaluated (positively or negatively) based on whether it helps people pursue meaningful partnerships (Hobbs et al. 2017).

4. CONCLUSION

The study of partner choice has been and continues to be a central issue in family sociology and demography. Given the implications of endogamy and exogamy, as well as of homogamy and heterogamy, for the reproduction of social inequality, the significance of partner choice extends to social science in general. Patterns of assortative mating emerge out of the dynamic interplay of partnering needs, preferences, and opportunities. Systematic similarities and dissimilarities between partners who start a relationship can be explained by several theoretical mechanisms, including matching, competition, and exchange processes. As all of these factors involved in partner choice are profoundly affected by the socio-cultural context, match-making does not just involve two individual parties.

Conceptualising partner choice as happening on a partnering market does not necessarily mean that partner choice should be seen as a utility-maximising rational choice process. While the market approach does imply some kind of conscious decision making, it does not entail that those involved are conscious about all factors affecting such decisions – just like buying products in a supermarket may be guided to a large extent by unconscious and in many ways ‘irrational’ factors.

Partner choice also plays an important part in the enactment of gender. Given the major changes in gender relations in recent decades, including the reversal of the gender gap in edu-

cation and women's enhanced participation in the paid labour market, recent work on partner choice and partner markets has focused to a large extent on gender equality and inequality, with the empirical evidence suggesting that the partner preferences of men and women are converging, even though important differences remain. While most of this research has been on heterosexual relationships, partner choice among same-sex couples represents an emerging topic that may shed new light on gender issues in the coming years.

The internet is playing an increasingly important role in partner choice, not just because the technology has become widely available and pervasive, but also because the age range of the partnering market has greatly expanded, mostly as a result of union instability. More traditional opportunities for finding a partner tended to be focused on adolescent and young adult singles, whereas online dating is accessible to all ages. So far, the evidence indicates that matches formed online are structured in very similar ways to those forged in the offline world.

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14. Causes and consequences of family dissolution in Europe and post-divorce families

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1. INTRODUCTION

This chapter looks at the uncoupling of relationships, both married and cohabiting. Relationship dissolution, and specifically divorce, is a phenomenon that has attracted the attention of social scientists since the 1970s. However, the perception that the rate of union dissolution has increased dramatically over the last half-century is only partly true. The divorce rate has indeed increased, leading some scholars to declare the end of a period in which Western societies were governed by the motto that ‘what God has joined together, let no one separate’, or the assumption that marriage will last ‘till death do us part’. But it is important to keep in mind that divorce has existed throughout human history, and is much older than the current Western tradition of marrying and divorcing. For example, the Babylonian Code of Hammurabi (1772 BCE) already contained legal regulations governing marriage and divorce (Trevino 2013). Nonetheless, the research we discuss in this chapter captures a previously unobserved decoupling trend. In recent decades, relationships have become less stable, and, as we will discuss, are increasingly intertwined with social inequality. We start this chapter by defining the central concepts of divorce and separation. We then outline the general trends in divorce in the industrialised world. Next, we explore the risk factors for divorce, and discuss some of the consequences a break-up is likely to have for the ex-partners and their children. While we employ a European perspective, we cannot ignore the large amount of empirical evidence on this topic from the United States (US). Where possible, we introduce the reader to comparative studies that place the divorce phenomenon in an international perspective.

2. DEFINING DIVORCE AND SEPARATION

Divorce is the central concept in this chapter, and is a term that seems almost unnecessary to define. Divorce is most commonly defined as the *legal dissolution of a marriage*. Rates of divorce are captured in official statistics, and can be compared across countries (see below). However, a divorce can also be seen as the end point of a more complex process during which the quality of a marriage deteriorates, as conflicts between the partners arise, and they become increasingly estranged. While sociologists and demographers often consider the break-up of a couple as a discrete phenomenon or life event, the end of a long-term relationship generally does not occur at a single moment in time.

The moment the partners are divorced, they receive the legal status of ‘no longer being married’. But prior to that point in time (i.e., the divorce event), the partners had already been in a process of uncoupling. From the perspective of family law, there are two (potential) phases that couples go through. In the first phase, the partners decide to end their relationship. Often,

one partner subsequently moves out of the marital home, which means that the two ex-partners are, from a legal perspective, (*spatially*) *separated* (but still married). In the next phase, the partners are *legally separated* (sometimes also known as ‘divorce from table and bed’). In some countries, the partners can ask the court to take preliminary measures that apply until the divorce is finalised. In this period, the partners remain married, while a judge makes decisions regarding the rights and duties of the respective partners, such as their rights to property (e.g., who lives where), their obligations to pay ex-spousal alimony and child maintenance, and their rights to child visitation. In some countries (e.g., Italy and Germany), this period of legal separation represents an *obligatory legal separation*. The idea behind this obligatory separation is that the partners should have a ‘waiting period’ (or probationary period) before their divorce is finalised; i.e., that the partners may be ending their marriage prematurely, and would therefore benefit from a ‘cooling down’ period before they take the final step of dissolving their marriage. In practice, however, very few legally separated couples reconcile. Thus, most countries have abolished this obligatory separation period (Senaev 2000).

The second phase is the divorce procedure itself. In this legal process, the partners officially request that the government dissolve their marriage, and award them the administrative status of ‘divorced’ (or in some cases ‘unmarried’). While a divorce is usually granted through a court decision, it might also be finalised through an administrative procedure pursued by a municipal officer or a notary. As divorce laws differ significantly across countries, both the procedures used and the length of the divorce process can vary considerably.

In a highly diverse society, this legal approach to divorce hides the reality that the phenomenon of uncoupling takes many forms. When family researchers started studying the increase in divorce, their sole focus was on union dissolution among married heterosexual couples. But given that in many countries same-sex couples are now permitted to marry, these couples also face the risk of divorce. Furthermore, divorce researchers have been forced to expand their focus as rates of marriage and divorce have declined, and cohabitation and union dissolution have become more common. Thus, even though we still use the term divorce, it no longer refers exclusively to the decoupling of married, heterosexual spouses. Rather, it has become an umbrella term for all uncoupling processes, irrespective of the gender composition or the legal bond of the couple.

In addition to identifying *who* is experiencing a break-up, we need to consider the life course perspective on coupling and uncoupling. When discussing divorce, the impression could arise that most people have one long-term married or cohabiting relationship that might be dissolved at some point during the life course. In reality, life – but also the heart – goes on after divorce. Re-partnering is inherent in the pattern of the formation and dissolution of partnerships. When a new partner enters the life course of an individual, s/he opens her/himself up not only to a new love, but to new potential conflicts that could result in a higher-order break-up (and, hence, in new partnerships). As divorce is often regarded as an event that each person experiences only once, these subsequent processes of bonding and relationship dissolution are not well understood. At present, divorce research is predominantly focused on divorces of first marriages, even though the process of finding a partner and then leaving a partner could occur numerous times over a person’s entire life course (Amato 2010).

3. FAMILY LAW AND UNCOUPLING

When reviewing the evolution of divorce laws, we first need to look at the concept of marriage. In Europe and the US, marriage has long been a patriarchal institution in which a wife was more or less the property of her husband. In his classic study on the 'leisure class', Veblen (1965) described how wealthy men use their spouses as signifiers of their wealth by adorning them with jewellery and expensive clothes. For centuries, men were given complete control over women's property, earnings, and sexuality. Moreover, in choosing a marriage partner, whether the union enhanced the political power or property of the respective families was considered more important than the level of love and intimacy between the partners (Coontz 2006).¹ Thus, in many countries, divorce was either prohibited or allowed only under very strict conditions. In addition, as filing for divorce was very expensive, only the rich had access to divorce, while poor people often split up without officially divorcing. The shift from arranged marriage to modern marriage, in which the main focus is on personal fulfilment and emotional attachment, also instigated a shift in thinking about marriage dissolution. The modernisation of 'the love match' (Coontz 2007) not only revolutionised marriage, it set in motion a trend towards divorce, as the focus on individual fulfilment and mutual love in marriage also implied that loveless relationships should be ended. As long as divorce was forbidden, it remained in the shadows, with couples splitting up but never publicly moving on to a new relationship or a new marriage. This shift in the perception of marriage inspired family law regimes to provide new options for legally ending a marriage.

Until the late 1950s and 1960s, divorce in Europe and the US was prohibited except in well-specified cases. The only grounds for leaving a marriage were adultery, violence, or (large) debts. A first step in the loosening of divorce laws was the introduction of *mutual consent regimes and fault divorces*. In such cases, divorce was allowed only when both partners consented (unless the aforementioned grounds for divorce were present) or when a guilty party could be identified. As in criminal law, the family judge who dissolved a marriage named a guilty and an innocent party. How property was divided and which partner got custody of the children often depended on which partner won or lost the divorce case. From the 1970s onwards, divorce law underwent two additional changes (although these changes did not occur in every state and country, and the pace and the degree of these changes varied). The first major change was the introduction of the *no-fault divorce*, in which the end of a marriage was no longer legally attributed to the 'fault' of one partner. In some jurisdictions, the classic divorce grounds were retained, and a no-fault divorce was offered only as an alternative to seeking a divorce based on wrongdoing. In other jurisdictions, all divorces were considered no-fault divorces, and proof of guilt was abandoned as a legal principle. Parallel to the introduction of no-fault divorce, *unilateral divorce* became a legal option. Under traditional divorce law, couples need to provide mutual consent to divorce. If one partner wanted to stay married, divorce was not possible (or had serious consequences in terms of property rights and child custody). With the introduction of unilateral divorce, if one partner decided to divorce, the law no longer forced that partner to stay married, even if the other partner refused to consent to the divorce. As we mentioned above, these changes in divorce law were also accompanied with a streamlining of legal procedures. Waiting periods were abolished in many countries, and the total length of the divorce process was reduced. An overview of legalisation of divorce and the shift towards no-fault and unilateral divorce can be found in González and Viitanen (2009).

Several studies that have examined the question of whether these ‘easier’ legal options for obtaining a divorce have influenced overall divorce rates (see the next section). They have found that changes in divorce laws caused sudden spikes in the overall trend in divorce rates that dissipated over time. Wolfers (2006) showed for the US and González and Viitanen (2009) found for Europe that the shift towards no-fault and unilateral divorce legal regimes has caused overall divorce rates to increase by between 0.2 to 0.4 divorces per 1000 people per year. While the option of unilateral divorce contributed to this trend, it was the introduction of the no-fault divorce option that had a significant (albeit limited) surplus impact on the divorce rate.

It is important to stress that improved access to divorce and the expansion of legal options for obtaining a divorce through the evolution of family law are not the only changes that have affected trends in marriage dissolution. Parallel to this evolution, child custody arrangements in divorce settlements have received increasing attention. The first divorce laws mostly focused on the material well-being and living arrangements of the couple’s children. As it was assumed that the welfare of children was best served by living with their mother (except in cases of abuse or neglect), mothers were automatically granted child custody, while fathers were automatically required to pay child maintenance. Although laws regarding financial obligations following divorce differ between countries, the general principle is that financial compensation is given to the financially weakest party, and to the party most involved in raising the children (Claessens and Mortelmans 2018). However, as the cultural understanding of marriage has evolved, views on parenting, and on fathering in particular, have changed. In response to the growing expectation that fathers contribute to the socialisation of their children, joint legal custody has been introduced, followed by joint physical custody (Nielsen 2018; Steinbach 2019). In addition to regulating living arrangements, family law regimes are increasingly reminding parents that they have lifelong parenting responsibilities, even after their partnership ends. In the Netherlands, for example, couples are obliged to draw up a ‘Parenting Plan’, which is a binding agreement that outlines how the parents plan to provide care and support for their child, and how they intend to communicate and inform each other about the child’s well-being (de Bruijn et al. 2018).

4. DIVORCE TRENDS

It is well known that divorce occurs across the globe, and that divorce rates have been rising until very recently (Emery 2013). For decades, statistical offices have monitored marriage and divorce trends based on several indicators. In all countries, there is evidence that rates of relationship dissolution have been rising. The most simple indicator that can be used to track divorce trends is the *absolute number of divorcees*. For a given population, we can count the number of people who are currently divorced (and not remarried), and can follow that number over time. The advantage of basing an analysis on the absolute number is that it reflects the current size of the group of divorcees. The disadvantage of doing so is that the proportion of divorcees could stay stable when the population itself is growing. Therefore, the *crude divorce rate* is used more frequently in time series. This measure is defined as ‘the ratio of the number of divorces during the year to the average population in that year. The value is expressed per 1000 inhabitants’ (Eurostat 2019). Table 14.1 gives an overview of the crude divorce rate for selected countries since 1960.

Table 14.1 *Crude divorce rate (1960–2010) in five selected countries*

	1960	1980	2000	2010
France			1.9	2.1
Germany	1.0	1.8	2.4	2.3
Sweden	1.2	2.4	2.4	2.5
United Kingdom		2.6	2.6	2.1
United States	2.2	3.5	4.0	3.6

Source: National Center for Health Statistics (2019); Eurostat (2019)

The disadvantage of relying on the crude divorce rate is that it does not take into account the composition of the population. For example, if the birth rate is decreasing, the divorce rate will rise automatically (even when the number of divorces stays stable). The divorce rate also increases when the age at marriage decreases, as couples have a higher risk of divorce at younger ages. Therefore, the *refined divorce rate* can be used to calculate the number of divorces in a given year relative to the number of married women in a certain age bracket.

For decades, demographers, economists, and family sociologists have been debating trends in divorce, particularly in the US. These analyses have generally taken two different effects into account: period and (marriage) cohort effects. *Period effects* occur when all marriages are influenced by a phenomenon at the same time. An example of a period effect is a change in divorce law. *Cohort effects* (we are referring here to marriage cohorts, and not to birth cohorts, as is often done in demography) occur when couples marrying in a specific year do so under different conditions than cohorts marrying in another year. An example of a cohort effect is a change in attitudes or values that affects a certain marriage cohort. If members of a younger marriage cohort no longer see marriage as a lifelong commitment, but as a contract that could be broken, this cohort might have different divorce risks than older cohorts. Most of these studies concluded that period effects in divorce are larger than cohort effects (Teachman 2002).

The results displayed in Table 14.1 show that crude divorce rates have been rising for decades. Explaining this sharp increase is difficult. Both economic and cultural theoretical models have been developed to explain why divorce rates have been increasing in the industrialised world. The economic theory of the family sees specialisation and mutual dependence in couples as protective factors in relationships. The sex-specific specialisation in the male breadwinner model led to the development of a family system that was supposed to optimise marital resources and human capital (Becker 1981). It thus appeared that the increase in the number of women entering the labour market since the 1970s disturbed this equilibrium, and gave rise to more break-ups. Indeed, there is empirical evidence of a correlation between female employment and divorce trends in many countries (Kalmijn 2007). This cultural explanation is known as the theory of the second demographic transition (Lesthaeghe 2010). According to this theory, the demographic changes that have been taking place since the 1960s (including the increase in divorce) have been driven by individualisation, secularisation, and a rise in post-materialist values. These changes have led to a deinstitutionalisation of marriage (a weakening of the power of social norms to dictate the partners' behaviour) and, in turn, a lowering of the threshold for leaving a marriage (Cherlin 2004). This theoretical approach is more difficult to test empirically, as appropriate and constant measurements of values are often lacking in longitudinal household surveys (and are entirely absent in administrative data). Nevertheless, some efforts have been made to examine the validity of this theory by looking at

gender-egalitarian values in couples (e.g., Kaufman 2000). The results of these studies indicate that men with more egalitarian attitudes have a lower risk of divorce.

More recently, a levelling off of or even a decline in divorce has been observed in some countries. This evolution in crude divorce rates has led to the formulation of new research questions regarding macro-level developments. The first and most important question that arises is: 'Have marriages indeed become more stable?' As a decrease in divorce rates suggests that fewer people are divorcing, it may be assumed that marriages have become more stable. However, a second, related question then presents itself: 'Given that unmarried cohabitation is becoming increasingly common, is it possible that the plateauing of divorce rates is attributable to the rise in unmarried cohabitation?' After all, these couples do not enter marital or divorce statistics. With respect to the first question, the outcomes of earlier advanced statistical analyses showed that there was no real decrease in divorce rates (Goldstein 1999). However, more recent analyses have found that although divorce rates decreased between 1980 and 2000, more recent marriage cohorts are more stable, as the divorce risk has fallen among younger couples (Cohen 2018). A partial explanation for this recent decline in divorce risk is the selectivity of marriage: i.e., that those who choose to marry in a time when unmarried cohabitation is becoming the norm are in more stable marriages. Research on cohabitational break-ups has shown that unmarried cohabitation is less stable than marriage (Guzzo 2014). The explanation for this effect lies in the selection into these types of relationships. The value patterns of cohabiting couples are more individualised, and are therefore less stable. Liefbroer and Dourleijn (2006) have also shown that the prevalence of cohabitation in a country reinforces this effect. Thus, while it is possible that the increase in unmarried cohabitation is responsible for the levelling off of divorce rates, this issue has yet to be conclusively settled.

5. DIVORCE RISKS

By defining the concept of divorce and discussing the national trends in divorce, we have demonstrated the complexities that we must take into account before we start studying the phenomenon of divorce. These intricacies only multiply when we move past the process of the event itself. The field of divorce studies is divided into three domains: namely, the causes, the processes, and the consequences of divorce. These domains have not been developed to the same degree. For example, as we have little in-depth knowledge about the process of divorce, we are unable to include it in this chapter. We do, however, have considerable knowledge about the antecedents and the consequences of divorce. Nevertheless, providing a concise overview of all of the causes and consequences of divorce is an impossible task for a chapter in a textbook. Some excellent overviews are available, and the interested reader will find much more detail there than we are able to provide here (Bradbury et al. 2000; Lyngstad and Jalovaara 2010). We deliberately chose the term 'divorce risks' as the title of this section. Although we often refer to the causes or antecedents of divorce, it is important to keep in mind that relationship instability can never be perfectly predicted. While research has shown that certain couples have an elevated risk of divorce, such results do not tell us whether their relationships will actually end. Moreover, the phenomenon of divorce is so multifaceted that not a single marriage would survive if divorce risks were deterministic.

No general theory has been proposed that is capable of explaining the multiple pathways into divorce. Nevertheless, some scholars have tried to develop a general theoretical frame-

work. The most prominent general theory is the social exchange theory of Levinger (1965, 1976). Levinger based his theory on the observation that the bond of marriage can be explained by the cohesiveness of a social group. In other words, if we want to know why partners stay together, we have to look at why members of a group stay together as a group. The marital bond is kept together by three forces: (1) the attractiveness of the marriage itself, (2) the costs of breaking up, and (3) the inverse relation between the attractiveness of the marriage and cost of the alternative (being single or entering another relationship). The attractiveness component consists of affectional (love, charm), material (income, assets), and symbolic (status) rewards. The costs of leaving the relationship are also affectional (risk of loneliness), material (risk of becoming poor), and symbolic (risk of stigma as divorcee). The third component in the theory shows that the relationship is based on a constant evaluative balance. Partners exchange benefits and costs, and evaluate whether their balance is (still) greater than potential alternatives. This subjective cost-benefit ratio is usually referred to as 'marital quality', and is measured using indicators of marital satisfaction. Levinger's theory has inspired divorce research from both the macro (e.g., Wagner 2019) and the micro perspective (e.g., Boertien and Härkönen 2018). The risk factors we discuss in this section can all be classified as benefits, costs, or alternative attractions. However, these risk factors can also be characterised as psychological, sociological, economic, and biological risk factors. Some of these risk factors were mentioned earlier in this chapter. For example, we have noted that premarital cohabitation or unmarried cohabitation is associated with an increased risk of divorce (Guzzo 2014; Rosenfeld and Roesler 2019).

Levinger's theory identified marital satisfaction as an important risk factor in divorce, and this factor has been extensively examined in *psychological* studies on divorce. Marital quality studies have focused on the interpersonal processes between partners, and, more specifically, on how partners deal with conflict and solve problems. Both visible (violence) and invisible (emotions, interpretations of behaviour) (re)actions are taken into account (for an overview, see Bradbury et al. 2000). In addition to marital satisfaction, personality has been shown to influence the stability of a relationship, with some personality traits outperforming socio-economic risk factors in predicting divorce (Roberts et al. 2007). We can expect personality to become an even more important risk factor in the future as the erosion of traditional family norms progresses (and external barriers to divorce weaken). Personality is often studied with the aid of the 'Big Five' model, which refers to five traits that make up an individual's personality, and that influence his/her relationship stability to varying degrees. Neuroticism, extraversion, and openness are linked to an increased risk of relationship dissolution; whereas conscientiousness and agreeableness are associated with a reduced risk of relationship dissolution (e.g., Lundberg 2012). People with high levels of agreeableness and conscientiousness tend to have stable marriages (e.g., Boertien and Mortelmans 2017), while people who are highly neurotic (difficult to live with) or highly extraverted (constantly open to new alternatives) are more likely to divorce.

From a *sociological* or *demographical* perspective, both timing factors and individual characteristics are risk factors for divorce. Among these timing effects is the *intergenerational transmission of divorce*. Having divorced parents increases the risk of divorce; thus, children of divorced parents are more likely to divorce themselves. The explanations given for this phenomenon are threefold. First, children of divorced parents might lack relationship skills, as they are less likely to learn these skills while being socialised. Second, children in broken families may 'learn' from their parental home that a marriage is something that can be broken

(Amato and DeBoer 2001). Third, the stress of the divorce and a decline in financial resources (see the consequences of divorce) may lead children of divorced parents to leave the parental home early, and to enter a partnership at a younger age than their peers. As this can result in a less optimal partner match, their risk of divorce increases. This last explanation is also used in a more general way to account for the effect of *age at marriage*: the younger a person is when s/he marries, the higher his/her divorce risk is (South 1995). Another life course-related risk factor is the rank of the marriage. Higher-order marriages are less stable than first marriages, as there appears to be no learning effect of a first divorce in terms of marital stability. Rather, there is evidence that having undergone a divorce lowers the threshold for separating a second or third time (Coleman et al. 2000). As divorcees often enter cohabitating relationships after the break-up, the lower level of stability in higher-order relationships is also partly explained by the *type of relationship*. As we noted previously, studies have shown that cohabitating relationships are less stable than marriages (Guzzo 2014; Wu 1995). This pattern is partly attributable to a selection effect (or a *wedding effect*), as the strongest cohabitations often turn into marriages, which, in turn, increases the dissolution risk of cohabitations as a whole. Other explanations for this higher dissolution risk are that cohabitation is considered a trial marriage (cohabiters are less certain of their partner choice, and may indeed conclude that a match is not suitable), and that people who cohabit have different value patterns than people who marry (Liefbroer and Dourleijn 2006). As we mentioned above, the second demographic transition theory posits that changes in values have resulted in demographic changes. For example, having more individualised *values* and being less *religious* tend to increase the risk of divorce (Lehrer and Chiswick 1993).

Two sociological risk factors for divorce that have attracted considerable attention in the literature are related to the partners' educational attainment levels and their children. The question of whether having higher *educational attainment* increases or decreases the risk of divorce has sparked huge debates in the literature. Most of the studies that examined this topic focused on the effect of female education. According to classic economic theories of the family, women with higher education (i.e., more human capital) have more opportunities to leave the marriage, which destabilises the relationship, and thus increases the risk of divorce (Becker 1981). However, it has also been argued that women with higher educational levels tend to have higher levels of economic security, which can reduce the financial stress in a relationship, and help to stabilise the marriage (Oppenheimer 1997). The results of a recent meta-analysis suggest that these mixed findings are attributable to a reversal of the educational gradient over time (Matysiak et al. 2014). Cross-country analyses (Härkönen and Dronkers 2006) uncovered evidence not only of a change in the gradient, but of huge international differences in the effect. The number of studies on the protective character of children is far smaller. Having *children* is a protective factor that reduces the risk of divorce among both married and cohabiting couples (Steele et al. 2006). Children are a 'marriage-specific capital' (Becker et al. 1977, p. 1154), which means that the 'costs' of dissolving the marriage are higher, both economically and emotionally, when children are involved. It is, however, worth noting that the ages of the children matter: i.e., that the protective effect of children diminishes as they grow older (Waite and Lillard 1991).

The *economic* risk factors of divorce are generally related to *income and labour force participation*. The focus of the literature on these factors has been on the so-called specialisation and independence hypotheses. According to the Beckerian specialisation theory (see above), when gender specialisation in the marriage is disrupted by female employment, the risk of

divorce goes up. While some authors have found evidence for this specialisation hypothesis (e.g., Jalovaara 2001), the independence hypothesis has been widely criticised, and countered with the argument that a marriage tends to be more stable when both spouses contribute to the income of the household (Oppenheimer 1997). In addition, the effect of the wife's employment on the couple's divorce risk differs depending on whether the partners are living in a country with social policies that support (gender) equality, and that encourage a more equitable division of unpaid household labour (Cooke et al. 2013). The global economic crisis of 2008 has also revived interest in the association between unemployment and divorce. Especially for men, unemployment has a negative impact on relationship stability (Charles and Stephens 2001; Solaz et al. 2020). However, in difficult economic times, there is a negative relationship between the unemployment rate and the divorce rate (at the country level) due to the postponement of divorce (Amato and Beattie 2011).

Finally, it should be emphasised that many other risks in addition to those discussed above have been identified. When either of the spouses or their children have health problems (physical or mental), the risk of divorce increases. Domestic violence and alcohol or drug abuse are also positively associated with instability. Furthermore, genetic research has been looking into the genetic components of the intergenerational transmission of divorce (D'Onofrio et al. 2007). A very recent domain of investigation has even been examining the role of technology – and, more specifically, of social media use – in relationship break-ups (Clayton 2014).

6. CONSEQUENCES OF DIVORCE

In their 1991 meta-analysis, Amato and Keith (1991) identified eight domains of the consequences of divorce for children, which were additionally mediated by several socio-demographic background characteristics. For adults, the consequences of divorce have been studied in the domains of psychological adjustment (well-being); health (physical and mental); social adjustment (social networks and loneliness); economics (income and poverty); behavioural adjustment (drinking, drug use, violence); parenthood (both from the child's and the parent's perspective); and, in particular, children's custody arrangements (both legal and physical) and educational attainment. These consequences have been studied in both the short and the long run. Amato and Cheadle (2005), for example, have looked at the consequences across three generations, and found significant negative effects of (grand)parental divorce on children's educational attainment, marital quality, and levels of contact with their own parents. The consequences also have been studied from both a cross-sectional and a longitudinal perspective. The use of such approaches is important, given that research on the consequences of divorce has to address the selection-causation question. Partners who divorce are confronted with consequences that might have been already present during the marriage. Thus, these consequences may have played a role in the deterioration of marital quality that eventually led to the break-up. As we will discuss in more detail below, the ex-partners might suffer financially after a divorce. Moreover, as we pointed out above, financial stress and economic hardship can lead to marital problems, and, eventually, to the dissolution of a marriage. Therefore, when evaluating studies on the consequences of divorce, we need to consider both the time since the divorce (as some consequences wane after a period of time) and selection issues (as these factors might significantly reduce the severity of the consequences).

As our discussion up to this point makes clear, the potential consequences of divorce are so extensive that even a separate chapter on this topic would struggle to provide an overview of all of the existing research results. Therefore, we refer the reader to some overview studies, as we did above in our discussion of the causes of divorce (Amato 2000, 2014; Amato and James 2010; Kelly and Emery 2003; Wallerstein 1991). In the remainder of this section, we will focus on two specific consequences: one for adults and one for children. First, we will examine the economic consequences of divorce for ex-partners. As a decline in income is associated with many other aspects of people's well-being, including their health, we think that this domain is an important field of study. In our examination of the consequences for children, we will focus on the educational attainment of children whose parents divorce. As educational attainment greatly influences the subsequent life course of an individual, it is an important domain that has been extensively studied.

When we look at research on the financial consequences of relationship dissolution, we see that one central finding dominates: namely, that in financial terms, women suffer more from a break-up than men. DiPrete and McManus (2000) reported for the US that, on average, men lost 15 per cent of their adjusted household income, while women lost 26 per cent of their income following a divorce. This finding is surprisingly constant over time. For example, Hauser et al. (2016) reported that US women experienced a decline in income of 25 per cent; while de Vaus et al. (2017) found a decrease in income of 30 per cent. The results for Europe are comparable to those in the US, with women losing financially and men showing a more diverse pattern of gains and losses – even though the sizes of the changes in income are found to differ across European countries. These differential trends have been attributed to cross-country differences in labour market conditions, child-care infrastructure, and family policies (e.g., marital taxation systems, or financial subsidies for parental child care) (Andreß et al. 2006).

In addition to estimating the changes in income, researchers have looked at the strategies ex-partners develop to cope with their financial losses. When considering financial behaviour after a divorce, the literature tends to focus on two main coping mechanisms: finding a new partner, and changing one's labour market behaviour. Some studies have taken into account a third strategy: namely, returning to the parental home, which has also been called the '*boomerang effect*' (Albertini et al. 2018). Studies that take *re-partnering* into account as a coping strategy have observed different effects based on gender, with men, on average, re-partnering more quickly and more frequently than women (Coleman et al. 2000; South 1991). One explanation for this pattern is that having (young) children will intensify a divorcee's economic needs, while at the same time lowering his/her chances of re-partnering due to his/her decreased meeting opportunities and level of attractiveness. A second explanation looks at a divorcee's job, observing that having a good job tends to increase a person's attractiveness, while also increasing the individual's re-partnering opportunities through intensified contacts and an enlarged network. From a Beckerian point of view (see above), this latter explanation only applies to men. For women, being employed will reduce their re-partnering needs (financially speaking), and make them less attractive, as they are less available to take on the female role in a specialised household with a single earner. Furthermore, socio-economic factors influence the re-partnering of both men and women, albeit in opposite directions. For women, a non-significant or a negative educational gradient has often been found. This has been characterised as an independence effect among higher-educated women (Ozawo and Yoon 2002). For men, their chances of re-partnering has been shown to increase as their educational level

risers. The second strategy for coping with financial losses after divorce is to increase one's *labour market participation*. Increasing employment activities as a response to the breakdown of a relationship can improve a divorcee's income position, and lowers his/her risk of poverty (Dewilde 2006). Not surprisingly, women find it more difficult than men to increase their labour market participation, as their care burden often hinders or prevents them from working more. Moreover, pre-separation role patterns – with women tending to care for children at the expense of their careers – can influence a potential return to the labour market later on. These two strategies of re-partnering and increasing one's labour market participation are related. Research has shown that when these strategies are combined, seeking or remaining in full-time employment outweighs the benefits of re-partnering for women (Jansen et al. 2009).

The research has also repeatedly shown that children whose parents divorced have lower levels of educational attainment than children whose parents remained married. This observation is sometimes combined with the finding that less educated couples are more likely to divorce, which implies that their children carry a double burden. In response to these findings, McLanahan (2004) has developed the 'diverging destinies hypothesis', which states that the disadvantages people experience in childhood accumulate across their life course. In 1991, Amato and Keith (1991) performed a meta-analysis showing the (long-term) negative outcomes of parental divorce on children's educational careers. The effect size was found to be negative and significant. While differences were detected between boys and girls, these differences turned out to be non-significant. Follow-up studies conducted in the US provided mixed results, either confirming or contradicting these findings. Björklund et al. (2006), for example, initially observed a negative effect, but reported that this correlation disappeared after siblings-difference models were applied. However, scholars have been advised to proceed 'with caution' in interpreting these results (Sigle-Rushton et al. 2014), as the statistical technique used may have influenced the findings.

Having presented evidence that a parental break-up negatively affects children's academic achievement, we now look at why this is the case. Bernardi and Radl (2014) have proposed five mechanisms that could explain this negative correlation: (1) economic hardship after divorce, (2) changes in parenting, (3) increased parental stress, (4) the child's emotional crisis, and (5) selection. The socio-economic circumstances in the parental home are considered to be an indicator of the social context in which the child is growing up. As the family's financial circumstances become more difficult after divorce (see above), the child's opportunities are reduced, which can, in turn, lead to worse educational outcomes. However, Sigle-Rushton et al. (2014) pointed out that this correlation is subject to timing effects, and that the divorce is less likely to have a negative influence on the child's educational outcomes if s/he is close to graduation. The second and third mechanisms attribute worse educational outcomes in children to changes in parenting processes and parental stress. A divorce is a stressful event (Amato 2000) that affects the lives of both children and their parents. As their parents are breaking up, the children tend to live (for a certain period of time) in a stressful environment in which they are receiving less parental attention. As a consequence, children may receive less support, and their grades might deteriorate. A similar argument refers to the fourth mechanism, but from the child's perspective. Stress and psychological maladjustment in children can influence their schoolwork, and, ultimately, their final educational level. The issue of selection has been discussed above, and is a more general theoretical argument that underpins the field of research on the consequences of family processes.

Most studies on the consequences of divorce have been conducted in the US, where data from several long-running panel studies are available (Wallerstein 1991). Nevertheless, studies in the United Kingdom and Germany (Bernardi and Boertien 2017), Sweden (Björklund et al. 2006), and Finland (Erola and Jalovaara 2016) have confirmed the US results for the European context. More recently, international comparisons have reported that the correlation between parental divorce and educational attainment differs across countries. For example, Bernardi and Radl (2014), found a negative effect of divorce on educational attainment in all of the 14 countries they studied. They attributed these country differences to selection processes in the educational system; i.e., that when educational tracks are selected earlier, the divorce penalty is much greater.

7. SUMMARY AND CONCLUSIONS

In this chapter, we have provided an overview of existing divorce research. This field is so extensive that we were forced to make hard choices about the studies we included; thus, some interesting findings were left out. We started the chapter by defining divorce – or, rather, uncoupling, as cohabitations also dissolve, and tend to do so at a faster pace than marriages. Next, we looked at family law and the evolution of divorce procedures over time. The availability of unilateral and no-fault divorce has now spread to all industrialised countries. However, the main driver of the spectacular increase in divorce is not the law, but a combination of economic and cultural factors that have significantly influenced family life over the past 50 years. In the second part of the chapter, we discussed the extensive research on the causes and consequences of divorce. The many studies on this topic that have been published over the decades clearly indicate that divorce is a multifaceted phenomenon. A wide range of risk factors endanger marital stability, with between one-half and two-thirds of marriages ending in a divorce. Many of the same factors appear to affect the consequences of divorce. There is evidence that divorce has negative effects on the relationship stability of both adults and children, and that some of these effects can be measured across generations.

What will the future bring? As Cherlin (2004) showed more than a decade ago, predicting trends in family life has become a complex endeavour. One trend certainly seems to prevail: marriage is no longer a universal ‘till-death-do-us-part’ arrangement. The life courses of most people living today will be characterised by multiple waves of coupling and uncoupling. Complexities in the family kaleidoscope (Mortelmans et al. 2016) are increasing, and call for the development of new theoretical perspectives (Sigle 2016). While families and stratification processes are becoming ever more intertwined, we do not yet fully understand the impact these family complexities are having on the life course. As divorce researchers, we are not (yet) equipped to deal with this hyper-complexity. Some initial progress has been made in studies on union dissolution among same-sex couples (Andersson et al. 2006), trans people (Dierckx et al. 2018), or living apart together relationships (Connidis et al. 2017). Nevertheless, even though we have access to large-scale survey infrastructure and administrative data, most of these data are on traditional family forms like marriages and cohabitations. In order to develop new theoretical insights into the causes and consequences of divorce, mixed-method studies that provide timely insights into new and complex family processes are needed. One specific blind spot that demands attention is the role of technology. As Tinder and other dating platforms become increasingly widespread, family sociologists know little about whether the use

of this technology represents a risk factor for relationships or a helpful tool in dealing with complex families by reducing stress and poor relationship quality. At this moment, we have no clue whether we should swipe left or swipe right.

NOTE

1. See, for example, the Head and Master laws in the US.

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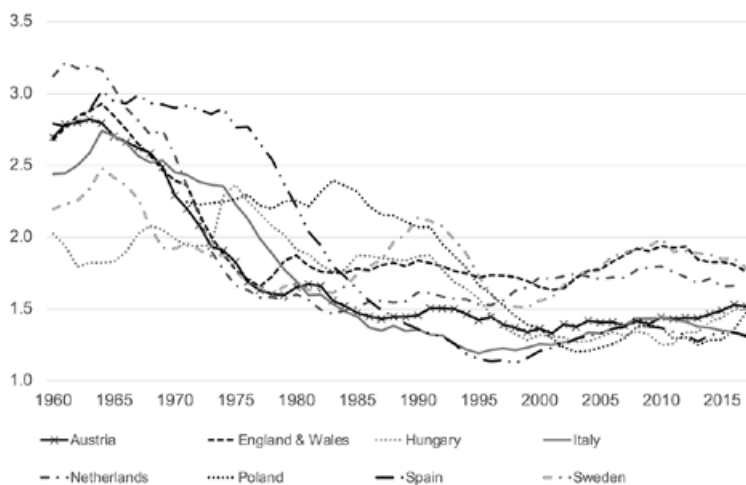
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15. Fertility desires, intentions, and behaviour

Ann Berrington

1. EUROPEAN FERTILITY TRENDS

In almost all high-income countries, period fertility rates are well below the replacement level of 2.1 births per woman, which is the average number of births required to replace one generation with another in the absence of migration. But there are significant differences between and within countries in childbearing behaviour, in terms of both the timing of entry into parenthood and completed family size (Mills et al. 2011). In this chapter, we focus on Europe, where fertility rates (as measured by the period total fertility rate (TFR)) increased during a 1960s baby boom, and then fell significantly, to either low or lowest low (less than or equal to 1.3 births per woman) levels. Figure 15.1 presents the trends for a number of selected countries to show the diversity across Europe, and to include a variety of geographical regions. In Northern and Western Europe, fertility rates fell during the 1970s as individuals started to postpone the age at which they became parents, and to reduce their overall number of children. The rising mean age at first birth (Figure 15.2) and increased childlessness were part of a broader wave of changes in family formation (including delays in partnership formation, declines in marriage, and increases in separation) that led to the coining of the term ‘the Second Demographic Transition’ (Lesthaeghe 1995). The decline in fertility rates took place later on in Southern European countries, including in Spain, where the TFR fell from 2.2 births per woman to 1.3 births per woman within a single decade (1982–92).

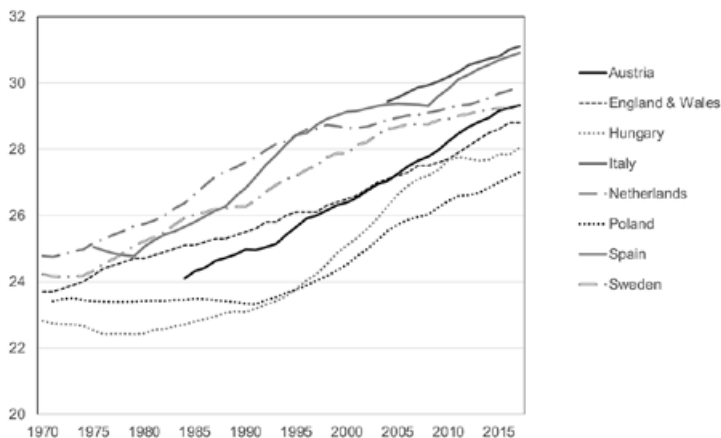


Source: Eurostat (2019); HFD (2019).

Figure 15.1 Total fertility rate in selected European countries 1970–2017

Lowest low fertility spread rapidly within Europe during the 1990s. In many Eastern European countries, fertility rates dropped following the collapse of socialism, partly as a result of tempo distortions in the TFR. These distortions occurred because young adults were postponing childbearing, partly in response to increased economic uncertainty and delays in the age at leaving full-time education (Kohler et al. 2002), but also because various institutional and financial supports for high fertility that were provided during the socialist era had been removed.

The interpretation of the socio-economic and cultural drivers of lowest low fertility is complicated by the fact that period rates of fertility such as the TFR can be affected by tempo distortions in childbearing behaviour – i.e., by changes among cohorts in the ages at which childbearing takes place (Bongaarts and Feeney 1998). Generally, when childbearing starts to be postponed (delayed to later ages) among young cohorts, period indices of fertility are depressed; and when cohorts recuperate (catch up) their fertility at older ages, the TFR rises once again. Thus, it is possible for a population to maintain a steady completed family size of an average of two births per woman, but still exhibit substantial fluctuations in fertility. However, period fertility rates have been significantly below replacement level for over three decades in countries such as Austria, Germany, Italy, and Spain, and are thus associated with significant declines in completed family size. Completed family size, or cohort fertility, refers to the average number of children women will give birth to by age 45. Low average completed family size at a population level can be achieved in different ways, depending upon how many women end up with zero, one, two, three, or more births. By examining parity-specific trends, recent research has shown that the route to lowest low fertility has differed regionally in recent decades (Zeman et al. 2018). In Southern Europe, levels of fertility postponement have been pronounced (Figure 15.2), and levels of childlessness have increased significantly.



Source: Eurostat (2019); HFD (2019); ONS (2017).

Figure 15.2 Mean age at first birth in selected European countries, 1970–2017

In Eastern Europe, entry into motherhood generally takes place at slightly younger ages, but there has been a marked decrease in second birth rates, with one-child families becoming

more prevalent. In Northern and Western Europe, there has been a more modest postponement trend, and more evidence of fertility recuperation. Starting in the late 1990s, a clear polarisation within Europe emerged in which many Northern and Western European countries had TFRs of around 1.7–1.9, whereas many Central (e.g., Austria), Southern, and Eastern European countries had fertility rates of 1.3 or lower.

During the early 2000s, period fertility rates increased in many countries. But since 2010, the trends have been more mixed, with Northern and Western countries exhibiting decreases in period fertility at the same time as many Southern and Eastern countries have been experiencing increases. These developments have resulted in a slight convergence of levels around 1.4–1.7 births per woman. Increases in period fertility in some Eastern European countries such as Hungary are likely to be associated with the slowing down or cessation of postponement. However, no such recovery in period fertility is apparent in Spain, where the mean age at first birth has continued to increase to reach an average of 30.9 in 2017 (Figure 15.2).

2. IDEAL FAMILY SIZE AND THE FERTILITY GAP

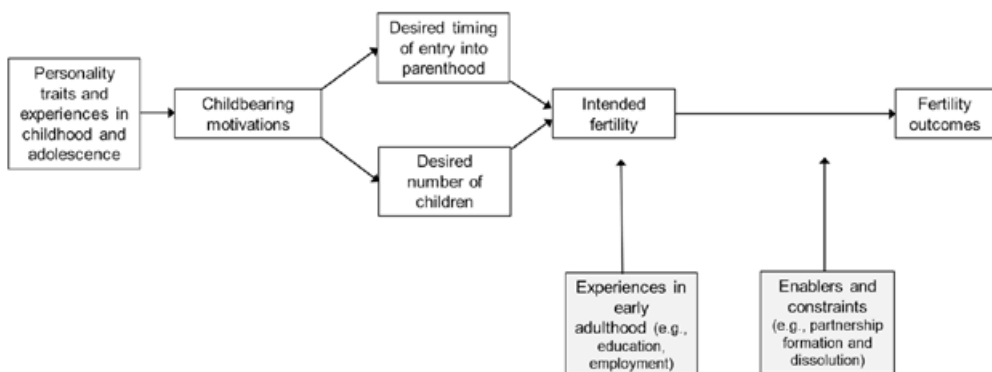
Even as fertility rates have been declining, the stated ideal family size preferences of women in most European countries have remained near or above replacement level (Goldstein et al. 2003; Sobotka and Beaujouan 2014; Testa 2012).¹ This disparity between aggregate fertility desires and achieved fertility has been described as a ‘fertility gap’ (Philipov 2009) or an ‘unmet demand for children’ (Brinton et al. 2018). In the context of rapid population ageing caused in part by declines in fertility rates, evidence of a ‘fertility gap’ was enthusiastically embraced by European policy-makers who assumed that if the right family policies were implemented, people would be able to have the number of children they wanted (Philipov 2009). To inform the development of such policies, academic researchers intensified their efforts to use individual data to investigate the reasons why fertility intentions often remain unrealised. A number of theoretical frameworks were developed and applied, including the European Union 7th Framework Funded REPRO project (Liefbroer et al. 2015), which is discussed in more detail in the next section.

The ‘fertility gap’ concept has been critiqued on a number of grounds (Goldstein et al. 2003). First, it has been suggested that responses to questions relating to ideal and desired fertility merely reflect existing societal norms (e.g., for a two-child family). Other scholars have questioned whether individuals have sufficient information about their future ability to reproduce or their socio-economic circumstances (Westoff and Ryder 1977) to anticipate their ideal family size. Thus, these scholars have argued that childbearing decisions are not fixed, but are, rather, made sequentially. This concept has also been critiqued on methodological grounds. It has, for example, been pointed out that the usual way in which the ‘fertility gap’ is constructed – e.g., from cross-sectional Eurobarometer Survey data – does not compare the fertility desires and behaviour of the *same cohorts* of women, but instead compares the intentions of women currently having children with the achieved fertility of past cohorts (Beaujouan and Berghammer 2019). Furthermore, we cannot infer relationships between desires and fertility outcomes at the individual level from macro-level analyses. Studies using individual longitudinal data have found that some women underachieve and some overachieve their earlier stated desires and intentions (Berrington 2017; Berrington and Pattaro 2014; Morgan and Rackin 2010; Quesnel-Vallée and Morgan 2003). These important criticisms of

this research notwithstanding, the existence of the ‘fertility gap’ led to renewed interest in the 2000s in identifying the factors that affect the realisation of fertility desires and intentions. In the rest of this chapter, we review some of the key theoretical approaches and findings from this work, and suggest some ideas for future research.

3. THEORETICAL APPROACHES TO UNDERSTANDING FERTILITY INTENTIONS AND THEIR REALISATION

A number of different theoretical approaches, each with different emphases, have been used to examine the link between fertility desires, intentions, and fertility outcomes. Miller’s Traits-Desires-Intentions-Behaviour (TDIB) model (Miller 1994), shown in Figure 15.3, assumes that individuals have motivational traits (which could be genetic or psychological in origin) that endure over time. ‘During growth and development, biologically based, largely hereditary characteristics of the individual interact with the individual’s childhood and adolescent social environments, leading to the formation of a motivational substrate for childbearing’ (Miller et al. 2010, p 394). While these motivations are generally not observed, when they are activated, they are experienced as childbearing desires. It is not until the perceived situational constraints are assessed – e.g., an individual’s partnership status or employment situation – that desires are converted into intentions. Intentions imply some degree of personal commitment to act, albeit within an unspecified time frame (Miller 1994). The TDIB model has been used together with behavioural genetic analyses of siblings in the National Longitudinal Study of Youth in order to demonstrate the importance of genetic precursors to fertility motivations, which then act through desires to influence intentions, and ultimately influence outcomes (Miller et al. 2010). The TDIB model is sometimes avoided because of its demanding data requirements. It has, however, provided new insights in cases in which detailed prospective information was available. For example, the 1958 British Birth Cohort Study (Berrington and Pattaro 2014) followed



Source: Own representation based on Miller (1994).

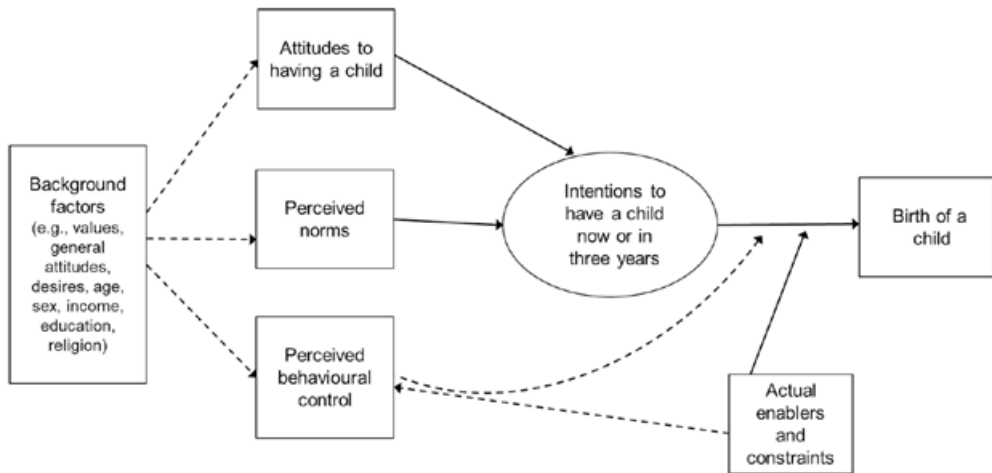
Figure 15.3 Traits-Desires-Intentions-Behaviour framework

up participants from birth to age 46, collecting detailed information on their parental fertility trends, childhood circumstances, fertility desires in adolescence (at age 16), and intentions in adulthood (at age 23).

Berrington and Pattaro (2014) found that parental characteristics (e.g., maternal age at first birth) and socialisation in childhood (e.g., sibling group size, parental expectations for the respondent's education) affected the desired timing of family formation differently than they affected the desired number of children. Consistent with the TDIB framework, family size intentions reported at age 23 were revised downwards in young adulthood as individuals experienced more of life, entered the labour market, and saw for themselves the economic and non-economic opportunity costs that childbearing entailed. Mean completed family size at age 46 (1.76 for men and 1.91 for women) was significantly lower than intended family size reported at age 23 (2.23 for men and 2.30 for women). In total, just 36 per cent of men and 43 per cent of women had achieved their intended number of children, with those who wished to remain childless and those who wanted to have two children being the most likely to have realised their fertility intentions. Consistent with evidence from the United States (US) (Morgan and Rackin 2010; Quesnel-Vallée and Morgan 2003), the analysis showed a tendency to underachieve fertility intentions, especially among those who originally intended to have a larger family.

The Theory of Planned Behaviour (TPB) is a general theory that has been developed within social psychology (Ajzen 1991), and has been applied to a wide range of issues, including fertility behaviour (Liefbroer et al. 2015) (Figure 15.4). The TPB makes explicit that an individual's context can affect his/her intentions through the formation of attitudes (e.g., relating to the advantages and disadvantages of having children), subjective norms (e.g., social influences exerted by significant others, such as parents and friends), and the individual's perceived behavioural control. These conditions can, in turn, influence the extent to which the individual's intentions are realised. Moreover, the TPB specifically acknowledges factors that may either enable or constrain an individual from carrying out his/her intentions, such as the availability of child care. A large number of empirical analyses of both fertility intentions (e.g., Billari et al. 2009; Dommermuth et al. 2011; Klobas and Ajzen 2015) and their realisation (e.g., Riederer et al. 2019; Spéder and Kapitány 2015) at the individual level using TPB have been carried out over the past decade. These studies often used data from the Generations and Gender Surveys (GGS), which included a special adaptation of the TPB for use in studying fertility decisions. The GGS focus on a short time horizon, such as on the respondents' intentions to have a birth now, or within three years. This body of work has found that while attitudes, subjective norms, and perceived control all play an important role in the formation of intentions, the relationships between these influences differ by country, age, and current parity, which makes formulating policies to reduce the 'fertility gap' complex (Klobas et al. 2015). In Norway, for example, Dommermuth et al. (2011, p. 42) found that subjective norms influenced intentions, as those respondents who expressed confidence that their intention to have a child was supported by their friends and family were more likely to want to have a child now, rather than within the next three years. Furthermore, the respondents' perceived ability to cope with having a child (deemed a proxy for behavioural control) was also shown to be associated with positive intentions. Billari et al.'s (2009) analyses of Bulgarian GGS data suggest that economic constraints and the ability to form a partnership were key factors affecting perceived behavioural control, and contributed to lower fertility; but also that attitudes played a larger role than norms in intentions to have higher-order births. The TPB is a useful tool for

understanding the interactions between the macro and the micro levels (Klobas and Ajzen 2015). Brinton (2016) used the TPB and data from a number of GGS countries – some with moderate levels of fertility (e.g., France, Norway) and some with very low levels of fertility (e.g., Austria, Hungary, Italy) – to show how social norms and institutional arrangements affect perceived barriers to childbearing. She found that in countries with gender-essentialist family roles (male breadwinner, female caregiver), individuals reported greater financial barriers to childbearing, and particularly concerns relating to housing and childcare. She also argued that the cultural or institutional context can moderate the impact of economic uncertainty on childbearing. Thus, in Southern Europe, the prevalence of traditional gender role attitudes meant that childbearing was only considered possible when the male partner was able to fulfil a breadwinning role.



Source: Own representation based on Dommermuth et al. (2011).

Figure 15.4 Theory of Planned Behaviour applied to fertility

The TPB focuses on reasoned action. More recently, demographers have developed the Theory of Conjunctural Action (Johnson-Hanks et al. 2011) and the Cognitive Social Model (CSM) of fertility intentions, which combine ideas from cognitive science with insights about social structure from social theory (Bachrach and Morgan 2013). CSM differs from the previous two theories in that it does not stipulate that conscious intentions must precede behaviour, but instead suggests that fertility behaviour is the result of both conscious, deliberative intentions and non-deliberative, automatic cognitions. These cognitions are hypothesised to derive from social structures that are themselves composed of both material (observable) structures and schemas (abstract representations of the meaning of an object or event) (Johnson-Hanks et al. 2011). For example, depending on their gender, age, income, and geographical location, individuals are more or less likely to be exposed to or to identify with particular structures (and their material and schematic components). Schemas are not fixed, but are instead shaped by background factors, experiences, and life course transitions, such as becoming a parent or starting a new job (Bachrach and Morgan 2013). Thus, the CSM explicitly acknowledges

that fertility intentions will change across the life course, and considers the potential sources of these changes, which are likely to include life course transitions (Rybińska and Morgan 2018). Moreover, the CSM argues that fertility intentions are formed only when the ‘circumstances of a situation demand or motivate it’ (Bachrach and Morgan 2013, p. 468). The idea that intentions are constructed rather than retrieved is also emphasised by Ni Bhrolcháin and Beaujouan (2019), who suggested that fertility intentions are assembled when individuals are asked to report a preference, and that these preferences are constructed through personal experiences and life choices, observations of the family formation patterns of peers, and the influence of societal norms. These authors hypothesised that preferences crystallise over time. ‘From repeated exposure to reproductive choices, to the wishes of a partner, to the practicalities of family formation, of housing, of combining family and economic activity, people will ultimately arrive at clearer preferences, though these need not be very well articulated and may retain a constructive element’ (Ni Bhrolcháin and Beaujouan 2019, p. 43). Thus, arguably, the CSM more closely reflects the real-life experiences of childbearing, including unintended fertility, than comparable models. It does not assume that individuals are able to accurately predict their future circumstances, and allows for changes in intentions across the life course (Ni Bhrolcháin and Beaujouan 2019; Rackin and Bachrach 2016). The CSM is less exact than either the TDIB or the TPB models in pre-determining the factors that affect childbearing decisions (and can therefore be used to analyse a wide variety of quantitative and qualitative data).

The CSM is consistent with numerous empirical studies that have highlighted the uncertainty in reported intentions (Berrington 2004; Morgan 1981; Ni Bhrolcháin and Beaujouan 2019; Trinitapoli and Yeatman 2018); changes in intentions, particularly during the early life course (Berrington and Pattaro 2014; Hayford 2009; Iacovou and Tavares 2011; Liefbroer 2009; Rybińska and Morgan 2018); and the mismatch between stated intentions and fertility outcomes (Berrington 2017; Quesnel-Vallée and Morgan 2003; Rackin and Bachrach 2016). Empirical evidence supports the idea that fertility decision-making processes can be affected by early exposure to schemas, such as schemas that stress familialistic ideals and traditional gender roles as part of religious upbringing (Pearce and Davis 2016, p. 1433). Other research has found evidence consistent with the hypothesis that fertility intentions become more accurate in their predictions following key life course events, such as marriage and entry into motherhood (Rackin and Bachrach 2016).

The importance of considering life course processes has also been highlighted by Brehm and Schneider (2019), but a key feature of their approach is its acknowledgement that both partners are involved in fertility decision making. The Model of Dyadic Pathways (MDP) considers the shared experiences of the couple – i.e., the joint resources and behaviours and communication within the couple. The MDP allows an individual’s fertility intentions to change as a result of his/her interactions with his/her partner. Moreover, the MDP aims to combine existing frameworks (TDIB, TPB, and CSM) in order to bring both reasoned and unreasoned action into studies of childbearing. For example, by allowing motivations to act directly on childbearing behaviour (bypassing intentions), Brehm and Schneider (2019, p. 17) allow for a ‘laissez-faire pregnancy’ in which ‘a child is welcome, but neither intended nor unintended’.

The notion that there may be a degree of ambivalence in fertility intentions stems from the observation that significant proportions of the population are uncertain about how many children they intend to have; i.e., they respond to fertility intention questions with the answer ‘do not know’ (see, e.g., Berrington 2004; Morgan 1981; Ni Bhrolcháin and Beaujouan 2019). What is less clear is how to interpret this uncertainty. When asked a simple fertility inten-

tions question such as ‘Do you intend to have (any more) children?’, respondents are likely to provide answers that lie on a continuum from a definite ‘no’ to a definite ‘yes’, and the proportion who say they are uncertain is often related to age and current parity. Ni Bhrolcháin and Beaujouan (2019) argued that although some individuals are indeed uncertain about their underlying childbearing preferences, those who actually have a positive preference may provide an uncertain answer because they feel unsure that these intentions will be realised. For example, an individual may be unsure about his/her biological ability to have children, or about whether s/he will have a suitable partner.

Evidence from the US suggests that young adults have generalised intentions based on factors such as fertility ideals developed through socialisation. As people move into their main reproductive ages, their uncertainty tends to increase. However, as individuals reach the end of their reproductive lives, uncertainty is once again reduced as they become ‘too old’ to have additional children (Morgan 1981). Evidence for women in the United Kingdom (UK) suggests a slightly different pattern, whereby the proportions who are uncertain are relatively high up to age 35, but decline after age 35 (Ni Bhrolcháin and Beaujouan 2019). The proportions who provide an uncertain answer can be large, and it is important that this category of response is not ignored by analysts (Morgan 1981). Among childless men and women aged 30 in the UK, around 20 per cent of both men and women gave the response ‘don’t know’ when asked whether they were going to have children at some point in the future (Berrington 2017).

4. FERTILITY INTENTIONS DYNAMICS OVER THE LIFE COURSE

The availability of prospective longitudinal data, including repeated measurements of individuals’ fertility intentions, has allowed demographers to examine how intentions change over the life course. Data from the National Longitudinal Study of Youth 1979 (NLSY79) have been used to examine the trajectories of fertility intentions among US women. Hayford (2009) demonstrated that expected family size at age 18 was relatively homogenous across groups, but that differences gradually emerged, producing larger differences in expected (and completed) fertility by age 40. Rybińska and Morgan (2019, p. 1571) showed that women from NLSY79 who ultimately remained childless followed two trajectories of intention: ‘(1) repeated postponement of childbearing and the subsequent adoption of a childless expectation at older ages or (2) indecision about parenthood signalled through vacillating reports of childless expectations across various ages’. This fluctuation in intended fertility is also highlighted by Gemmill (2019), who found that most permanently childless women had reported a positive expectation of having children at some point in their life course. The instability of intentions across the life course is likely attributable to the uncertainty in intentions, as was discussed in the previous section.

In the UK, two types of prospective longitudinal data have been used to examine the dynamics of fertility intentions across the life course. Consistent with Hayford’s (2009) US findings, British birth cohort data also showed how intended family size drops between adolescence and young adulthood, and becomes more differentiated according to individuals’ early life course experiences, such as their age at leaving full-time education and their employment experiences in young adulthood (Berrington and Pattaro 2014). Repeated measures of fertility intentions are also collected with UK national household panel surveys. Drawing on data from the British

Household Panel Survey, Berrington (2004) and Iacovou and Travares (2011) showed that while some men and women make upward revisions of their intentions, they are more likely to report downward revisions. The proportions who revised their intentions were sizeable: six years after they were asked about their intended family size, only half of women aged 18–24 reported the same intention, with almost one-third having reduced it, and one-fifth having increased it (Berrington 2004). Iacovou and Travares (2011, p. 116) found that individuals often revised their intentions after separation and repartnering, after entering parenthood, and in response to their partner's expectations for childbearing. 'People whose partners expect more children than they do are more likely to revise upward; people whose partners expect fewer children than they do are more likely to revise downward.' As individuals approach the end of their reproductive lifespan, their intentions tend to be revised downwards. However, significant shares of childless men and women report having positive fertility intentions well into their 30s. As many of these individuals remain childless, the suggestion has been made that such people are 'perpetual postponers' (Berrington 2004, 2017).

5. PREDICTIVE VALIDITY OF FERTILITY INTENTIONS

The value of intentions as predictors of fertility has long been debated. At the individual level, stated intentions are significant statistical predictors of behaviour, and are often most closely associated with fertility outcomes, net of other factors (Berrington 2004; Régnier-Loilier et al. 2011; Schoen et al. 1999). However, data from NLSY79 (Morgan and Rackin 2010; Quesnel-Vallée and Morgan 2003), the British Birth Cohort Studies (Berrington 2017; Berrington and Pattaro 2014), and repeated panels such as the British Household Panel Survey (Berrington 2004) and GGS (Spéder and Kapitány 2015) have provided ample evidence of the mismatch between earlier stated fertility intentions and subsequent behaviour. Although some individuals exceed their intended family size, intentions remain unrealised in a greater number of cases. For example, almost one-third of childless British women born in 1970 who intended to have a child at age 30 remained childless at age 42 (Berrington 2017). Social scientists have attempted to explain this mismatch by either questioning the validity of the stated intention or discussing potential barriers to childbearing. According to Westoff and Ryder (1977), social desirability may prompt people who are uncertain to give a definite answer. Another explanation for this mismatch is that, especially where there is a long gap between the statement of intentions and outcomes, the intentions are modified in response to changing contingencies (Gemmill 2019; Trinitapoli and Yeatman 2018). While it has repeatedly been shown that intended family size decreases over the life course, whether such revisions result from changes in underlying preferences, or whether intentions are modified as a result of external constraints, remains unclear. If the latter is the case, then desires remain unfulfilled. The absence of a (suitable) partner has consistently been shown to be a key factor in the realisation of expectations (e.g., Berrington 2004; Berrington and Pattaro 2014; Hayford 2009; Quesnel-Vallée and Morgan 2003). Partnership formation, like childbearing, has been postponed to later ages. This postponement makes it harder for individuals to reach their reproductive goals, particularly given the decline in fecundability with age (Habbema et al. 2015). Women who start their childbearing at later ages have, on average, smaller completed family sizes (Berrington et al. 2015) as a result of this 'tempo-quantum' interaction (Kohler et al. 2002).

Explanations for the postponement of childbearing (see Mills et al. 2011 for a review) are also explanations for unfulfilled fertility intentions. Following a process of postponement, childbearing plans ‘can be easily diverted or superseded by other intentions drawing on other structures’ (Bachrach and Morgan 2013, p 472). The gap between intended and realised fertility is often largest among the most educated women (Berrington and Pattaro 2014). Increased female education raises the age at leaving education, and results in women preferring to postpone parenthood until they are more established in their careers. Women’s earnings increase the economic opportunity costs of reduced participation in the labour force to raise children. Institutional arrangements – e.g., subsidised child care or family-friendly employment policies that allow part-time work – can reduce the incompatibility of work and childrearing roles (Esping-Andersen and Billari 2015; Goldscheider et al. 2015; McDonald 2000). In Scandinavian countries, greater gender equity is associated with higher fertility, even though women’s levels of participation in the labour market are high. In contrast, in Italy and Spain, gender equity in the public sphere – e.g., in higher education and employment – is not matched by gender equity in the home, as women are expected to take on the bulk of child care and domestic work. Thus, women postpone childbearing and often have no children, or limit their family size to just one child. Qualitative research examining the reasons that highly educated women in low fertility countries give for their fertility intentions has provided partial support for the gender equity theory (Brinton et al. 2018). Men and women interviewed in Spain did not talk about gender inequity directly. Instead, they highlighted that due to poor economic conditions, women were being forced to participate in the labour force in order to contribute to the household income. It thus appears that because men were unable to fulfil the breadwinning role, childbearing was postponed.

When permanently childless women in Britain were asked about their reasons for having no children, relatively few cited career reasons (Berrington 2017), while larger shares cited ill health, both related to infertility and to more general health. This finding raises the possibility that delaying childbearing in order to focus on educational and career opportunities may indirectly affect women’s and (to a lesser extent) men’s ability to fulfil their fertility intentions due to the increasing chances of poor health and sub-fecundity associated with age.

6. FUTURE RESEARCH DIRECTIONS

To understand the relationship between fertility intentions and their realisation at the micro and the macro levels, additional research is needed in a number of areas. First, a gendered perspective is currently lacking. Only a few studies have examined whether men’s and women’s intentions differ, or whether the factors affecting childbearing decision making vary by gender (e.g., Berrington 2017; Brinton et al. 2018; Iacovou and Travares 2011; Okun and Yurovich 2019; Puur et al. 2010). To examine whether gender inequity is a key factor in promoting the very low fertility levels seen in Europe, we need to be able to analyse information from men and women about gender roles in the public and the private spheres, and about work–family conflicts. Prospective data are required to examine whether the introduction of policies designed to reduce gender inequity actually have an impact on fertility. Moreover, future research needs to recognise the roles of both partners in reproductive decision making (Brehm and Schneider 2019). When data availability has allowed analyses to take a ‘couple approach’, greater insight into these roles has emerged. For example, such studies have shown that

a woman's intentions can be revised in response to a new partner's intentions (Iacovou and Travares 2011), and that divergences in the male partner's and the female partner's intentions can constrain childbearing (Berrington 2004; Voas 2003).

Future studies of fertility behaviour should adopt a life course approach. But before this approach can be used, new prospective longitudinal data must be collected that provide repeated measures of intentions and perceived barriers to achieving these intentions; and multiple observations of people's other life circumstances, including their health, partnership, employment, and housing dynamics. It is only when they have such nuanced data that analysts can understand the effects of uncertainty and changes in other life course domains on childbearing intentions and their realisation. Ideally, cohorts should be followed from birth, with information being collected on, for example, parental socio-economic circumstances, parental demographic behaviour, childhood socialisation, and experiences in early adulthood. Such data would allow analysts to examine the inter-generational transmission of fertility behaviour, and the effect of early life course experiences on later intentions (Berrington and Pattaro 2014). Longitudinal studies such as the NLSY with annual or biennial measures of childbearing intentions have allowed researchers to model and predict longitudinal trajectories of childbearing intentions across the life course (Gemmill 2019; Rybińska and Morgan 2018).

Future studies need to better integrate the biological and social approach to fertility analyses (Mills and Tropf 2015). Family studies, and particularly twin studies, have demonstrated the heritability of childbearing behaviour. Motivations to have children are influenced not only by social factors, but by biological predispositions related to, for example, genetics, hormones, and neurological structures (Miller et al. 2010). Thus, future surveys should collect relevant biomarker and genetic data alongside social science data. Moreover, given the salience of health issues as reported barriers to the recuperation of fertility among childless postponers in the UK (Berrington 2017), more attention should be paid to the impact of physical and mental health on childbearing patterns.

Although fecundability tends to decline with age, especially after age 35, there is significant individual heterogeneity in the likelihood of conceiving at older ages (Habbema et al. 2015). Thus, it is difficult for individuals and couples to predict the likelihood of having problems conceiving when they plan their future families. Ovarian reserve assessments are now offered by fertility clinics in many countries, and can be used by women with no known fertility problems to estimate their remaining reproductive lifespan (Birch Petersen et al. 2015). More research is needed that explores the characteristics of women and couples who seek fertility assessments, their motivations for doing so, and how this information alters their childbearing intentions and behaviour. In many countries, reproductive choices have been extended by new technologies such as oocyte freezing; and by legislative changes, such as reforms that allow single women to use sperm donors (Birch Petersen et al. 2015). Baldwin (2018) has argued that social egg freezing is being encouraged by neoliberal ideologies that make women feel responsible for their own fertility; i.e., that egg freezing is being promoted as a way of managing the risk of ovarian ageing. Studies have shown that women are often keen to find the right partner to have a(nother) child with, and that social egg freezing can be used to take pressure off new relationships, and to enable women to avoid 'panic partnering' (Inhorn et al. 2018). More research is needed on the use of oocyte freezing and of reproductive technologies such as IVF by unpartnered men and women, as well as by same-sex couples.

Finally, within demography, the majority of existing studies of fertility intentions and childbearing outcomes are based on the analysis of quantitative data. More qualitative studies

in which individuals' voices are heard are needed if we are to understand the reasons why, for example, people postpone childbearing (Bernardi et al. 2008; Brinton et al. 2018), or decide to use reproductive technology (Baldwin 2018; Inhorn et al. 2018).

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NOTE

1. Exceptions to this trend included the younger cohorts in Germany and Austria, who became the first groups to declare an ideal family size preference of around 1.7 in the 2001 Eurobarometer Survey (Goldstein et al. 2003).

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16. Family behaviour of migrants

Gunnar Andersson

1. INTRODUCTION

Research on the family behaviour and family dynamics of migrants is a cross-cutting theme. Many of the broader features of family behaviour (such as intergenerational relationships or family diversity) are relevant in the study of migrant family behaviour. There are also many themes that are specifically relevant to migrants. The study of different aspects of migrant behaviour is a promising avenue of research, with the potential to uncover complexities and relationships that are not as easily tracked when studying less mobile populations. Studies on the family behaviour of migrants can take both a population and an individual-level perspective. Migration events and family dynamics have an impact on societies at large, and are influenced by contextual factors in both the societies the migrants come from, and the societies where they reside at any given point in time. Migration and family demographic events are intertwined in the life courses of individual actors. What makes the family behaviour of migrants so intriguing is that their life courses unfold over time across two or more spatial contexts, under the influences of all the social factors that are intrinsic to those respective contexts. This contribution begins with a population-level perspective, and considers the impact of migration on population change in Europe. It proceeds with a section that introduces a life course perspective on migration and family demographic behaviour, followed by a section that examines the many multi-level factors that may contribute to family demographic behaviour and family demographic change among migrants. The subsequent section focuses on family formation and family dissolution, and the section after explores the fertility of migrants. The contribution concludes with a discussion of data issues in relation to the fertility of migrants, and some of the challenges that arise in studies of the demographic behaviour of mobile individuals. The focus of the contribution is on migrants, with only limited attention being given to individuals who have a migration background, but are not themselves migrants.

2. MIGRATION AND DEMOGRAPHIC CHANGE

Most migration events occur when women and men are in their 20s. This holds for short-distance domestic geographical moves, as well as for migration across national borders. Migration is closely related to the process of family formation and of getting established as an adult, it is comprised of events related to leaving the parental home, establishing an independent household, union formation and dissolution, marriage and divorce, and becoming a parent. Migration events typically precede, happen in tandem with, or follow shortly after these family demographic events. At the population level, migration contributes to increases or decreases in population size, and to the rejuvenation or ageing of population age structures, either directly or indirectly. As the age schedule of migration peaks in the early to mid-20s, immigration adds people at relatively young ages to the receiving areas and subtracts people at the same

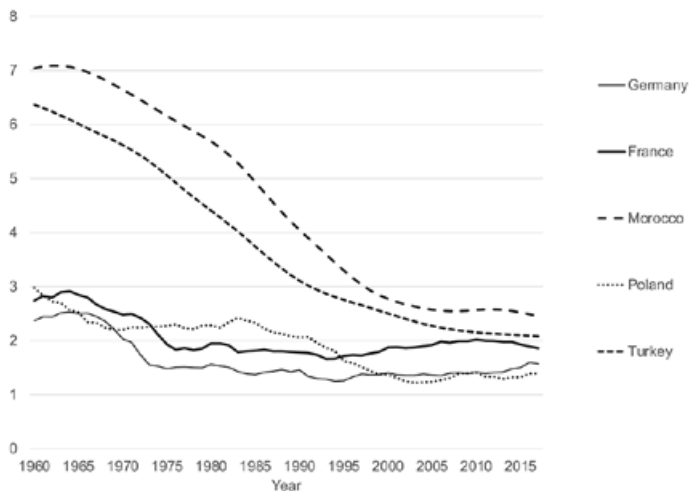
ages from the sending areas. Migration thus has the largest impact on population structures at ages that are also dense with events related to family formation, childbearing, and labour force participation. Regions that receive immigrants add not only young adults, but also a number of children born shortly after the immigrants arrive; while the opposite pattern occurs in regions that produce out-migrants. These dynamics are fuelled by the fact that age-specific migration rates peak at lower ages than those of age-specific fertility. Migration is more likely to precede family formation and childbearing than the other way around, and is usually undertaken in the early stages of the process of getting established as a young adult.

The size and the composition of populations in Europe with a migration background are produced by the past history of migration between regions and countries in Europe, as well as by the past history of immigration from and emigration to continents outside Europe. During and in the wake of the demographic transition in the nineteenth and early twentieth centuries (Notestein 1945), the size of the population in Europe increased exponentially, and the continent produced huge numbers of emigrants to America and other parts of the world. Calculations for a set of countries in Western Europe show that the direct and indirect effects of long-term international migration on population size is only now on the verge of producing any visible surpluses compared with the hypothetical situation of no international migration from and to these European countries during the last few centuries (Murphy 2016).

Europe as a whole went from being a net emigration region to an immigration region after the end of World War II. The transformation into a migration destination was most pronounced and took place earlier in Northern and Western Europe, while Southern Europe contributed to intra-European South to North migration for several decades. At the same time, several of the previous colonial powers of Europe received migrants from their past spheres of influence outside of Europe. Due to the barriers of the Iron Curtain of Europe, there was little East to West migration until the fall of communism in 1989. The latter type of migration has subsequently gained in importance. During the last few decades, most countries in Southern Europe went from being emigration areas to being destinations for migrants from both Eastern European and non-European countries. Enlargements of the European Union (EU) and the related freer movement of people within Europe have helped to make intra-European migration easier than it was before, and have also made the distinction between domestic and international migration less salient. All of this migration history (e.g., Castles et al. 2013) has produced and keeps producing migrant populations in Europe. Many of the processes that link migration and family behaviour have similar logics, regardless of whether the migration occurs domestically between regions of a country or across national borders. However, when migration occurs across longer distances – whether geographical or social – it involves more contrasts, ruptures, opportunities, and challenges for the individuals who migrate, and for the contexts in which they are embedded.

Thus, it is clear that migration contributes to a wide range of dimensions of demographic and social change in both the migrants' regions of origin and their destinations. The migrants themselves contribute to the ongoing family and demographic changes in the societies in which they live. Their origin and destination areas may be at different stages of the 'demographic transition', with entirely different fertility regimes. Figure 16.1 illustrates this pattern by displaying the fertility developments of France and Germany as representative of two leading countries of destination in Europe, and contrasting these developments with those in Morocco and Turkey, which used to be prime countries of origin for these destination countries. The figure shows that the Turkish and Moroccan migrants of the 1960s came from high-fertility

countries, which is no longer the case for their counterparts who have migrated since the turn of the century. In terms of their demographic contributions, we note that recent migrants from outside of the EU come in part from countries with higher fertility, but also from contexts with similar or even lower fertility than the levels that prevail in many migration destinations in Europe. In fact, there is an increasing shift towards migration from destinations with low fertility. Migrants within Europe often come from countries with low or very low fertility, and move to destinations in Northern and Western Europe with higher aggregate levels of fertility. This pattern is represented in Figure 16.1 by the example of Poland. In these cases, migration contributes to ongoing processes of population rejuvenation by adding young migrants to the populations in Northern and Western Europe, as well as to population ageing and decline by subtracting young people from the populations in Central and Eastern Europe.



Source: World Bank (2019).

Figure 16.1 Total fertility rate in typical destination countries (Germany and France) and selected countries of origin (Turkey, Morocco, and Poland), 1960–2017

3. LIFE COURSES ACROSS ORIGIN AND DESTINATION CONTEXTS

There is a large body of sociological research that has applied a micro-level perspective to the study of migrants, and to the dynamics that shape their life courses and the family behaviours that occur at different life course stages. A similar perspective is used in the demographic logics of analyses in which longitudinal duration data are analysed with statistical event-history techniques (see Konietzka and Kreyenfeld in this volume). As stated above, what makes the study of migrants so intriguing is that their life courses evolve over different social and geographical contexts, which allows for more refined research on how different contextual factors linked to places of origin and destination relate to individual behaviour; and on how the migration process itself intervenes in the processes of family formation, family dissolution, and childbearing. These approaches can also be easily linked to migration theory,

which discusses the role of push (from origin) and pull (from destination) factors in migration decisions, and the effects of the many intervening factors that stem from the migration process itself (e.g., Lee 1966). Studies on the family behaviour of migrants need to consider both pre- and post-migration circumstances, as well as the intervening process of migration. In addition, these studies need to consider the various multi-level dimensions of individual characteristics (with micro-level data), social networks (in meso-level data), and contextual factors related to culture, institutional factors, and broader social change (as measured in macro-level data) in relation to individual behaviour.

The role of contextual factors – as manifested by welfare states, social policy regimes, social citizenship, business cycles, political climate, demographic regimes, local family systems, family law, religion, culture, and social norms in relation to family behaviour – are all factors to consider in any sociology of the family, and are discussed in many other chapters of this handbook. Indeed, Europe provides an ideal laboratory for comparative family demographic research, with its huge variation at the national and sub-national levels in different aspects, dimensions, and combinations of these factors. With its many refined sets of comparative contextual and individual-level data infrastructures, contemporary Europe is perhaps the most rewarding region of the world to study with any research design that involves comparative family demographic research. The study of migrants offers additional possibilities for sociological and family-demographic research. This is still a largely untapped reservoir of research opportunities. Migration between countries in Europe multiplies the many contextual factors that are worth considering when factors related to the origin as well as to the destination combine in shaping individual behaviour. Migration from outside Europe brings influences from new contexts of origin that cover the entire spectrum of worldwide family systems and patterns of family demographic change, and all other contextual factors that may be at play in shaping migration, family behaviour, and onward and circular migration. A small fraction of migrants may come from high-fertility regimes that have yet to experience the demographic transition and its fertility decline. Others may come from low-fertility regimes, but from societies that have experienced less of the individualisation processes that are assumed to contribute to contemporary family change in Europe. Through these migrants, all the world's and all of Europe's family systems are brought together in a single analytical framework.

4. FAMILY DEMOGRAPHIC BEHAVIOUR OF MIGRANTS: CONTEXTUAL FACTORS AND INDIVIDUAL BEHAVIOUR

Family demographic life course research typically considers a standard range of individual-level factors related to different demographic and socio-economic characteristics of the study subjects. Some of these factors are time-varying, while others are fixed in time. In sociological research, factors related to norms, social interactions between individuals, and the broader social context are often considered. When studying migrants, scholars seem to focus on factors related to culture to a greater extent than they do when studying national native populations. In some cases, analysts appear to perceive migrants as having more cultural traits than their own ancestral population. The role of childhood socialisation into different modes of norms and behaviours is almost always stressed when migrants are studied. Socialisation is perceived as having occurred in and being influenced by the migration origin context, while different institutional and labour market factors are frequently seen as influential in the migration-destination

context, together with factors that may indicate a process of acculturation. Recent extensions of research also consider the role of transnational networks and transnational space, and thus have the capacity to take a more nuanced approach to these issues (Glick 2010, see also Merla et al. in this volume).

The role and the influences of different family systems in migration origins and destinations within Europe and beyond merit particular attention when the family behaviour of migrants is studied. In Europe, the church historically had a decisive impact by breaking down the influences of clan systems and the importance of lineages in family decisions (e.g., Goody 1983). This was done by placing severe restrictions on, for example, consanguineous marriages. The purpose was to strengthen the power of the church, but it also had long-lasting effects on family systems that stretched into later processes of family nuclearisation and increased individual autonomy. In many other parts of the world, family systems are built more decisively on the logics of lineages. In some cases, clan systems act as crucial factors in family-related behaviour and family demographic decisions (Goode 1963, 1993). However, there is also considerable variation in family systems within Europe, both historically and in contemporary family demographic change (see Ehmer in this volume).

The characteristics of labour markets and welfare states may have even more decisive effects on the family behaviour of migrants than of those individuals who are better established in a given society. Immigrants can sometimes be seen as being at the margins of society (Bledsoe 2004). The social policies of countries differ in the degree to which they include new residents, whether citizens or non-citizens. For migrants and non-migrants alike, policies that are linked to the marital status of an individual may affect socio-demographic outcomes to a greater extent in conservative welfare states than in the universalistic welfare regimes of Northern Europe (Neyer in this volume). Moreover, policies that regulate the right to marry someone from another country may differ both between countries and across time, and can have a particularly large impact on people with current or prospective migrant status. In the EU, some of these policies are harmonised, which may produce barriers to marriage-related migration from outside the EU, but facilitate family connections within the EU. Still, family law is a complex arena with the potential to create obstacles in family demographic processes across different countries within the EU as well.

Clearly, economic factors play an important role in migration, family formation, childbearing, and other aspects of family dynamics. This is the case for factors that can be measured at the individual level, as well as for more structural factors that belong to the contextual setup of different migration origins and destinations (e.g., Massey et al. 1993). Again, to understand these dynamics, it helps to consider the transnational nature of different economic relations. It is beyond the scope of this chapter to provide an account of different theories that characterise migrants and non-migrants as economically rational actors when making family, work, and other life course decisions. However, most researchers do consider a wide range of (socio-) economic factors in their research designs. To some extent, recent changes in international migration have maintained a bifurcation of the economic dynamics of migration into different segments; for example, of low-paid service workers and high-paid professionals (e.g., Castles et al. 2013). The family considerations at different levels of social stratification may differ substantially.

The role of contextual factors in individual behaviour is often mediated by interactions in different social networks to which individuals belong, and is studied at the meso level in researchers' analytical designs. In the case of migrants, these networks often stretch across

regional and national borders. Cultural factors may matter for family behaviour, and culture can be viewed as something that is maintained and recreated within the realms of social networks (Bachrach 2014). For migrants, family and community networks help maintain their ties to a multitude of locations across space and time (Boyd 1989).

As migrants form new families, it becomes necessary to consider the characteristics of newly created couples. For example, the partners may have different migration backgrounds, or one partner may have no migration background at all. Different modes of union formation mean that different types of individual-level and contextual factors need to be considered. Another line of research focuses on the children of immigrants in different contexts; the so-called 'second generation'. These individuals are not migrants themselves, but have a migration background through their parents. Given the more extended migration histories in many countries in Europe, studying this population has become increasingly important. Many of the hypotheses applied to immigrants do not apply to the second generation. As there are no own individual migration trajectories to account for, the focus is on issues of early life socialisation, perhaps in relation to segmented assimilation in communities of local minorities; and to the structural constraints that children of migrants may face in the society in which they grow up. This research is valuable, as it provides insight into processes of intergenerational relations and the more long-term processes of social change that may follow in the wake of international migration. Some research on the fertility of these second-generation populations in different countries in Europe has shown that their fertility is surprisingly low (Andersson et al. 2017a; Kulu et al. 2017), while other findings report that fertility levels remain high for specific sub-groups in the second generation (Kulu and Hannemann 2016). Taken together, these findings suggest that the scope for the long-term fertility-enhancing effects of international migration at the population level is very limited.

5. FAMILY DYNAMICS, MARRIAGE, AND DIVORCE

The family dynamics of migrants may be influenced by factors related to their regions of origin, as well as to their (re-)current destinations. Research on marriage and divorce among international migrants in Europe has shown that these patterns vary widely, even within a given country context. These differentials seem to largely reflect behaviours that are prevalent in the migrants' countries of origin, and thus provide some support for the claim that early life socialisation plays a role in maintaining the norms that underlie different family systems, and the prominence of marriage in relation to non-marital cohabitation. For example, Andersson et al. (2015) found that the marriage, divorce, and re-marriage rates of immigrants in Sweden are sometimes higher, and are sometimes lower than those of the native population of ancestral Swedes. In many cases, these differentials can be connected to patterns in the migrants' countries of origin. For example, the high rates of marriage, divorce, and re-marriage observed among migrants from regions of Africa and the Arab Mideast reflect a high degree of 'churning'. Meanwhile, patterns of early and stable marriage are found among migrants from Turkey, and late marriage and low divorce risks are observed among migrants from Southern Europe. Hannemann et al. (2020) presented similar findings in a cross-country study of partnership dynamics among immigrants in four European countries. They found, for example, high rates of marriage formation and low divorce risks among migrants from South Asia, and the opposite pattern for migrants from the Caribbean in the United Kingdom. Their cross-country

comparative study adds analytical depth by demonstrating that the country context in Europe seems to matter as well; the authors highlighted that different types of migrants in Spain seem particularly geared towards marriage, just as native people in this country are. In some study populations, the observed patterns sometimes fail to conform to expectations based on theories of country-specific early life socialisation. In such cases, researchers may seek explanations in theories of behavioural adaptation, whereby norms and attitudes to marriage and its alternatives are expected to change as migrants are exposed to new normative and behavioural contexts (e.g., Kahn 1988). Marriage is a symbolic status marker (Cherlin 2009), and norms are indeed likely to matter in nuptial behaviour. Such norms may be adjusted more rapidly by migrants than by others, as migrants are exposed to a wider array of contexts, to networks that stretch across space and time, and to networks that may be embedded in different segments of a given population (Portes et al. 2005). However, other explanations for differences in observed behaviour are also helpful. In many cases, such differences may be explained by different selection mechanisms, as migrants from a given country rarely represent the average of the people who reside in their country of origin. If selective migration is produced along dimensions that can be tracked by observable characteristics, then differentials in behaviour and outcomes can be linked to those factors.

It is also instructive to pay attention to the many instrumental and structural factors that support different types of family behaviour in a given context, and that may have similar or different logics for migrants and native people. Marriage can, for example, be perceived as offering a more secure status in a new and less familiar context, and may thus be seen as more attractive by many migrants than it is by non-migrants. On the other hand, in their new context, migrants may feel more free to resist normative pressures to conform to ascribed modes of family-related behaviour. For some migrants, however, the civil status of marriage is imperative for securing legal status in their new context (Bledsoe 2004). Marriage and family reunification are common motives for migration, and couple formation across an external EU border often requires that a marriage is registered. In other cases, marriage and migration are highly interlinked processes, even when migration takes place between different regions of a country or between countries within the EU (e.g., Haandrikman 2014). Thus, family (re)unification events produce higher rates of marriage formation for many groups of migrants in a given context. This may be visible in the marriage rates of male migrants, particularly in situations in which a male pioneer is later joined by his female partner in couple-related migration. It is also more common for a person with a migration history than for a native individual to marry someone from abroad. Some of the literature on the family behaviour of migrants focuses explicitly on the role of intermarriage, and the extent to which different groups of migrants are likely to marry endogamously (i.e., with someone from their own country of origin) or exogamously (i.e., with someone from their new country of residence) (Dribe and Lundh 2011). While intermarriage is often seen as a marker of social integration into the new context, it can also be considered a marker of how open the context is to new entrants.

Divorce risks are often higher for migrants than for non-migrants with similar characteristics (Andersson et al. 2015). To some extent, divorce risks are influenced by norms that support or hinder the initiation of divorce. In a new context, normative pressures to stay married may be felt less strongly. But divorce risks may also increase because migration is often a stressful process, and because it opens up entirely new and often unexpected life opportunities. Migration is sometimes perceived as having different disruptive effects on family-related behaviour. These effects may be reflected in the circumstances that stimulate

divorce, but they can also be conceived of as disruptions that tend to postpone the process of forming a marriage in the first place.

This section mainly focused on research designs that deal with marriage and divorce. However, this represents only a subset of a larger set of family demographic research designs that could be used to include migrants in studies that examine patterns of leaving the parental home, non-marital union formation and dissolution, non-marital childbearing, re-partnering, step-family formation, and other complex family arrangements (Thomson 2014). Migrants sometimes come from regions with much more complex or dynamic family systems than those in their new destination. This is, for example, the case for migrants from sub-Saharan Africa to Europe, or from Sweden to Spain; or the other way around, such as for migrants from familialistic contexts in Europe, such as Italy or Poland, to less familialistic contexts, such as France or Norway (e.g., Andersson et al. 2017b). Migrants experience family changes that take place in their own life courses, which are, in turn, embedded in larger processes of family change in both their regions of origin and their regions of destination.

6. MIGRATION AND FERTILITY

Many parts of Europe are characterised by below-replacement fertility and the prospect of population decline. In such contexts, immigrants may counteract the process of population ageing with their relatively young age structures. They can also contribute to population growth by having relative fertility rates that are higher than those of the ancestral populations in their destination countries. These possibilities have caused demographers to become interested in the fertility of migrants (Sobotka 2008), and help explain why research on migrant fertility is a relatively popular topic in European family demography. However, contrary to expectations, there is little evidence that the fertility patterns of immigrants have led to sustainably elevated fertility rates. When fertility patterns are studied with proper longitudinal data and relevant analytical techniques, the findings tend to indicate that within a short time after arrival, most groups of immigrants display fertility patterns that are remarkably similar to those that prevail in their respective destination contexts. Despite the considerable variation in marriage and divorce patterns among immigrants reported above, far fewer differences are found in the fertility behaviour of different groups of immigrants (for instructive examples based on data from Sweden, see Andersson and Scott 2005, 2007). In the lives of couples and individuals, the decision to have a child is far less reversible than the decision to marry. In most European contexts, childbearing decisions have more long-term, material, and practical consequences in the life courses of the people involved. The decision about whether to have a child may be more affected by structural factors in society and individuals' life circumstances, while decisions on civil status events may be more subject to the influence of different ideological and subjective factors among individuals and their networks.

A crucial reason why migrants rarely bring any high-fertility behaviour to their new contexts of residence, apart from that produced by their youthful age structures, is that there are few migration-sending contexts that still have high-fertility regimes. Except in sub-Saharan Africa, the worldwide demographic transition is about to come to its end. Most regions outside of Europe, just as all countries within this continent, currently have demographic regimes with replacement or below-replacement level fertility. The impact of these changes has been observed in the United States (Frank and Heuveline 2005), where the claim that Mexican

migrants bring culturally based high-fertility behaviour to the North is called into question by the fact that aggregate fertility in Mexico is no longer visibly higher than that of the United States. Similar arguments can be made for most migrant-sending regions that are located close to Europe, which once had relatively high fertility, but now have fertility levels that hardly differ from those in Northern and Western Europe. This is the case for key migration-sending areas such as Turkey, Iran, and North Africa.

From a sociological and social science point of view, there are many reasons why the study of immigrant fertility is an interesting field of research. It has the potential to provide information on processes of social integration, as migrants' childbearing behaviour is prone to change over time as their locations and life situations change. Clearly, it is equally instructive to study migrants who move from a high- to a low-fertility setting (e.g., Milewski 2007; Dubuc 2012) as it is to study those who move from a low- to a less low-fertility context (e.g., Hwang and Saenz 1997; Okun and Kagya 2012; Tønnessen and Mussino 2020; Mussino et al. 2020). The study of migrants from low-fertility settings has the potential to reveal some of the reasons for the unrealised fertility intentions (Beaujouan and Berghammer 2019) in the migrants' countries of origin; and, perhaps, to shed light on the logics of the low and lowest-low fertility levels of many regions in Europe. When people change their residential and social contexts in the course of their lives, it may be possible to disentangle the roles of current structural factors from those of cultural background in childbearing behaviour. As we stated above, with its diversity in institutional and social settings, Europe represents the ideal research laboratory for any comparative fertility research design.

7. DATA, METHODS, AND CHALLENGES FOR RESEARCH

7.1 Fertility of Migrants

Data on fertility are based on events that happen only a few times in most peoples' lives – or not at all. These data are sometimes aggregated to summary statistics for a given country or population sub-group. The most common fertility metric is the total fertility rate (TFR). The period TFR is constructed by summing the age-specific fertility rates of women aged 15 to 49 for a certain calendar year. It can also be calculated for a birth cohort of women who are followed over their reproductive career to provide a summary measure when that cohort has reached age 49. The period TFR is the most common summary statistic on fertility, as it provides an up-to-date and seemingly intuitive measure of childbearing outcomes (see Figure 16.1). However, the TFR is not a very good measure when the aim is to study individual behaviour; in this case, researchers have to rely on longitudinal life course data and suitable regression techniques. The TFR is particularly ill suited when applied to migrants in a given country; TFR statistics often provide inflated numbers on the childbearing outcomes of immigrants. This is because migration, family formation, and childbearing are often interrelated events. Migration, whether international or domestic, frequently occurs in relation to family formation. In situations like this, it is much more common to first make the move and then have a (first) child than the other way around. This sequencing of events produces elevated fertility rates in the regions where immigrants are located. Nobody can be an immigrant until after he or she has migrated, and the fertility rates of immigrants in a given context are thus calculated based only on a post-migration sub-section of their life courses. Research based

on longitudinal data has shown that the fertility rates of immigrants are elevated in the period immediately following migration, and that their childbearing intensities are later moderated. Thus, when the fertility of migrants is examined over longer periods, fewer differences in fertility are found between immigrant and native populations (e.g., Andersson 2004; Toulemon 2004; Milewski 2007; Parrado 2011).

Research based on longitudinal life course data has the potential to uncover some of the forces that underlie the elevated or depressed fertility of a given group of migrants. Early life socialisation in the migrants' countries of origin may contribute to their relatively high or low fertility. For example, some migrants were socialised in a context that values large families, while others were not. When migrants are exposed to a new context, they may adapt their fertility behaviour to the prevailing behaviour in their destination. This may occur through a process of acculturation in which migrants change their family behaviour norms, or through a process of adaptation in which migrants adapt their behaviour to the structural constraints that provide incentives or disincentives for having children in the new context. The close association between migration and family formation tends to produce elevated fertility in the period shortly after migration. On the other hand, this process may produce a disruption in childbearing behaviour immediately before the migration occurs. If none of these factors provides satisfactory explanations for the empirical findings, the researcher may argue that the selectivity of migrants from a given context contributes to outcomes that differ from those that are prevalent in the country of origin, as well as in the country of destination. Most publications on immigrant fertility provide an overview of these competing but not mutually exclusive hypotheses on selection, socialisation, adaptation, disruption, and the interrelation of events (for overviews, see Kulu 2005; Kulu and González-Ferrer 2014).

7.2 Data Challenges in Migration Research

Evidently, there is a wide array of theoretical approaches, analytical designs, and methodological techniques to consider when conducting empirical research on the family behaviour of migrants. The main focus of this contribution has been on issues to consider when attending to life course research on migrants and their family behaviour based on longitudinal data. In this case, the researcher has to deal with dimensions of both space and time. When performing life course research in general, it is essential to track time-varying data with information on changes in characteristics and the occurrence of life events as they evolve over time in the life course. Ideally, researchers would have access to data that also cover all relevant spatial dimensions of such processes. There are a few examples of multi-location studies with information on migrants and non-migrants in both their origins and their (re-)current destinations (e.g., Singley and Landale 1998; Baykara-Krumme and Milewski 2017; Kraus 2019). However, in most cases, the researcher is confined to using data that cover one geographical entity only, and to observing migrants in their current region of residence. This poses some challenges that are specific to research on migrants. The researcher has to deal with issues of left- and right-censoring to properly start and stop any analyses at the time of immigration and any subsequent re-migration, and consider the influences of entry and exit selection in the interpretations of empirical findings based on longitudinal data on migrants. We have already discussed how the interrelation of migration, family formation, and becoming a parent may contribute to artificially high levels of immigrant fertility when these events are summarised based on aggregated data only. Similar 'migration effects' may produce misleading conclu-

sions on immigrants' mortality. If some migrants are prone to move back to their country of origin in anticipation of poor health, many deaths will be recorded in the origin, and the mortality rates for a given group of immigrants in their assigned destination will appear artificially low; see Andersson and Drefahl (2017) for evidence of such 'salmon effects' in migrant mortality in Sweden.

Many family demographic studies are based on retrospective data consisting of information on migrants and on the events that occurred also prior to immigration. The latter type of data may be valuable as background information on the events and processes that are observed after migration has occurred. However, such data are not suitable for performing longitudinal analyses of the processes that occurred prior to migration. This is because these data do not represent any real-world population in the migrants' country of origin: a migrant is not a migrant until a migration has occurred. Hoem (2014) and Hoem and Nedoluzhko (2016) discussed the many pitfalls and biases that occur in studies that try to build on negative durations (since migration) in pre-migration spells, and the conditioning on the future that is attached to such anticipatory logics.

As we mentioned above, different approaches and analytical designs may produce different conclusions about immigrants and their family demographic behaviour. Different statistical metrics provide information on the tempo and quantum of family demographic outcomes. Some metrics are suitable for providing information on the timing of specific events in the life course, while other metrics are more suitable for providing information on the current or ultimate number of accumulated events. One way to avoid the many challenges of left- and right-censoring in research on migrant fertility is to focus on the completed fertility at the end of the reproductive career (e.g., Wilson 2019). Another strategy is to focus on immigrants who arrived as children (e.g., Mussino et al. 2020), as this avoids the various issues of left-censoring that need to be considered when migration events at adult ages are interrelated with those of family formation.

There may also be differences between countries in which individuals are considered migrants, and should thus be included in different studies on the family behaviour of migrants. At first glance, this may seem to be a trivial point, as a migrant is readily defined as a person who originates in a country or region other than the one in which he or she currently lives. Many statistical agencies produce statistics on foreign-born individuals; i.e., on immigrants. However, many countries also use other concepts in their approaches to tracing migrants and national minorities. Different concepts of ethnicity, race, citizenship, nationality, national minority, and ancestral natives are applied in statistics in different countries, and sometimes make comparative research on minority populations difficult. We have already considered the concept of the 'second generation', which refers to people who are not migrants themselves, but whose parents migrated. In some cases, the second or any subsequent generation of people with a migration background through their parents may develop into and become considered an ethnic minority in a given country. This phenomenon is also reflected in fertility research, which sometimes applies concepts from migration to the study of ethnic minorities in general (e.g., Kulu and Hannemann 2016). It has been argued that minority status can contribute to low fertility, as a focus on social mobility may cause individuals to compromise their fertility desires for the sake of their socio-economic advancement (Goldscheider and Uhlenberg 1969).

8. CONCLUSIONS AND DIRECTIONS FOR FUTURE RESEARCH

As this contribution makes clear, research on the family behaviour of migrants is a still largely untapped reservoir of opportunities with the capacity to produce entirely new insights into a wide array of research topics. The differential speeds and directions of behavioural change in relation to marriage, childbearing, and divorce that have been observed among different types of migrants, and across and within migrant generations, have yet to be explained. Previous research on the family behaviour of migrants has been heavily biased towards a focus on immigrants from contexts with relatively high fertility, and on women. Future research needs to pay equal attention to migrants from low- and high-fertility settings, and to men as well as women. Some researchers have found it useful to focus on migrants who arrived in their destination during childhood: this 1.5 generation of migrants may provide insights into the role of early life socialisation in different contexts, depending on the age at migration (Adserà et al. 2012; Mussino et al. 2020). Patterns of residential segregation and the scope for segmented assimilation may be particularly relevant for this generational category (Wilson and Kuha 2017). Practically every research design with a focus on migrants in Europe has the capacity to benefit from the rich contextual variation in European societies, and in the societies from which migrants in Europe originate.

As a final remark, it is imperative for family demographic research to pay equal attention to the life course careers of women and men. This holds for family research in general, and for family demographic research on migrants in particular. Clearly, previous research has lost many opportunities to gain a better theoretical understanding of different aspects of the gendered dimensions of family demographic behaviour by focusing too much, or exclusively, on women. In the case of migrants, such a gender bias is even more detrimental. Gaining a proper understanding of how the different processes of migration, family formation, and childbearing are interlinked requires a more thorough consideration of the sometimes different spatial and temporal logics of the life course dynamics of male and female migrants. Focusing on both sexes will provide improved insights into the dynamics of gendered interactions in couples and between single individuals, and into how these dynamics may change in the wake of migration.

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PART VI

INTIMATE AND INTERGENERATIONAL RELATIONSHIPS

17. Grandparent status and multigenerational relationships

Jan Skopek

1. INTRODUCTION

In the wake of the second demographic transition, changes in marriage and fertility behaviour, in conjunction with the mortality revolution, have profoundly affected how family is experienced in contemporary western societies (Lesthaeghe 2010). One aspect of changing family life that has received increasing attention from family scholars is the multigenerationalisation of the modern family and its consequences. According to Bengtson's (2001) widely cited theory on the rising importance of multigenerational bonds, declining fertility and soaring longevity caused family structures to morph from being 'pyramids' to being 'beanpoles' in which multiple generations in a family spent more of their years of life together than ever before. In response to those changes, family sociologists have produced a growing body of research on the meaning, functioning, and consequences of extended kinship and multigenerational family relations. In this chapter, I focus on one of the most common, and, thus, one of the most significant multigenerational bonds: that of grandparents and their grandchildren.

Research on grandparenthood has been greatly expanding in recent decades. One reason why this topic is attracting increasing attention is that becoming a grandparent marks a key transition in people's lives that reconfigures family relations and the associated roles in middle and later life stages. Thus, family research has occasionally referred to the transition to grandparenthood as a 'counter-transition' that marks a life change that is not directly self-initiated, but is instead caused by the transition to parenthood for the younger generation (Hagestad and Lang 1986). Nonetheless, the arrival of the first grandchild sets in motion a 'transition domino' that creates new role expectations as people move up in the generational structure of their family lineage (Hagestad and Burton 1986). For people who are ageing, progressing in the generational hierarchy of the family can be a strain, but also a joy. Indeed, a number of studies have shown that taking on the grandparent role can be a source of well-being, life satisfaction, identity, social support, and meaning for older individuals (Lye 1996; Silverstein and Long 1998). For example, Arpino et al. (2018) found that being a grandparent in Europe is associated with increased subjective well-being, and that active grandparenting – i.e., spending time with grandchildren and looking after them – is the primary source of this positive association. Other research has also demonstrated that for grandparents, spending time with their grandchildren can have positive effects on their physical and mental health, and on their cognitive functioning (Arpino and Bordone 2014; Burn and Szoek 2015; Condon et al. 2018; Di Gessa et al. 2016; Szinovacz and Davey 2005). However, as caring for grandchildren may also involve stress, grandparenting responsibilities can be detrimental to older people's health outcomes (Minkler and Fuller-Thomson 1999), particularly when the care demands are high (e.g., in skipped-generation households in which the grandparents take on the primary care obligations), and when the grandparents have competing roles (Hughes et al. 2007; Musil et

al. 2011). Furthermore, when older couples become grandparents, traditional gender roles and a gendered division of labour may be reactivated (Hank and Buber 2009; Leopold and Skopek 2014).

The childcare and family support provided by grandparents can be a crucial pillar of family solidarity and functioning. In contexts in which levels of female labour force participation are high and demands for non-parental childcare are rising, grandparents represent an important source of care assistance that can stabilise the economic status of the middle generations by allowing young parents, and particularly mothers, to work and earn income (Luo et al. 2012; Presser 1989). The amounts of time grandmothers and grandfathers spend looking after their grandchildren are substantial, but vary considerably across welfare states, which underlines the relevance of public childcare policies (Hank and Buber 2009; Leopold and Skopek 2014). Gender is a dominant factor, as grandmothers provide the majority of the childcare support (Leopold and Skopek 2014; Spitze and Ward 1998), which can have consequences for the labour supply of older female workers (Bavel and Winter 2013). Grandparents, and particularly grandmothers, may also be ‘rescuers’ in situations of family crisis such as divorce or parental loss (Cherlin and Furstenberg 1986; Jappens and Bavel 2019; Thompson 1999).

For young children, grandparents may be significant agents of socialisation and providers of resources that can enhance their social mobility and improve their long-term life outcomes. Given the important role grandparents can play in their grandchildren’s lives, a number of studies have examined the operation of ‘multigenerational’ effects on life course outcomes. For example, while taking the middle generation into account, several studies have found that grandparental resources and socio-economic status were associated with favourable grandchild outcomes in a variety of domains, such as cognitive development, physical health, and occupational attainment (Chan and Boliver 2013; Hertel and Groh-Samberg 2014; Modin et al. 2012; Modin and Fritzell 2009). Other studies have found that grandparent effects occur only in co-resident multigenerational households (Zeng and Xie 2014), are concentrated among lower-class children (Wightman and Danziger 2014), or cannot be detected (Bol and Kalmijn 2016). A common shortcoming of the literature on multigenerational influences – and one possible explanation for the mixed evidence on grandparent effects – is that most of these studies did not consider multigenerational exposure; i.e., the actual shared lifetime of grandparents and grandchildren, which multigenerational effects are likely contingent upon (Song and Mare 2019).

Given the growing body of research on grandparents and grandparenthood (Hank et al. 2018), it is surprising how little is known about the changing demographic fabric of the grandparent–grandchild relationship. For example, at what point in their lives do people become grandparents? How long is the grandparent phase expected to last in peoples’ lives? To what extent has the number of multigenerational family ties changed? How much of their lifetime do grandchildren spend with their grandparents? Has the time grandparents and their grandchildren spend together been increasing, as many family scholars believe? What is the role of social class and gender in shaping the demographics of multigenerational relationships? These questions are complex, but addressing them is crucial given that the meaning, significance, and performance of multigenerational family roles are contingent upon the demographic context in which they play out. Indeed, tracing empirically the changing demographic and life course contexts of multigenerational relations turns out to be a challenging and elusive area of research. The obstacles to the empirical study of those questions include a dearth of good data, as well as conceptual and methodological challenges. Hence, up to today, empirical

answers to the questions above continue to be scattered and incomplete. As I will show in this chapter, this is especially the case for European societies, as the empirical evidence on these issues that is available mainly applies to North America.

While focusing on the grandparent–grandchild type of multigenerational relationship, my aim in this chapter is twofold. First, I will review the rather scarce available evidence on the demography of grandparenthood and multigenerational families. This review will also discuss some methodological challenges researchers face when studying grandparenthood and multigenerational relations based on contemporary data. Second, using demographic kinship models, I will analyse multigenerational indicators in order to explore the question of how the demographic context of grandparenthood and multigenerational relations in Europe might have changed from the middle of the twentieth century up to today.

2. RESEARCH ON THE DEMOGRAPHY OF GRANDPARENTHOOD

2.1 Age at Entry into Grandparenthood

In the field of family research, interest in the demography of grandparenthood was sparked as early as in the 1980s, when life course scholarship became increasingly concerned with investigating the life-style consequences of prolonging longevity (Treas and Bengtson 1982). Although research on the grandparenthood role, as well as on the meaning and significance of multigenerational family interactions, was thriving at that time (Szinovacz 1998a), the lack of empirical knowledge on the changing demographic and life course contexts of grandparenthood was recognised. This issue was raised alongside a general critique that family scholarship had been turning a blind eye to the effects of demographic change on families. For example, as Uhlenberg (1980, p. 313) expressed it, the ‘impact of mortality change upon family structure, although sometimes mentioned, has been seriously neglected in studies of family history’. In a series of works, Hagestad and colleagues discussed how demographic change might have affected grandparenthood as a life course passage (Hagestad 1988; Hagestad and Burton 1986; Hagestad and Lang 1986), observing that ‘[p]opular depictions of grandparents [may] often reflect myths that are out of step with demographic realities’ (Hagestad and Lang 1986, p. 117). Indeed, based on evidence for the United States (US) that life expectancy is rising and childlessness rates are declining, Hagestad and her colleagues predicted that the grandparenthood role will become increasingly prevalent, particularly among women, and will last over longer stretches of people’s lifespans than ever before.

Moreover, older demographic studies suggested that declining mortality had a profound impact on American family structure, particularly with respect to the ‘supply’ of living grandparents for children (Uhlenberg 1980; 1996). For example, in the US, the share of children who could expect to have four living grandparents when they reached age 10 increased from around 6.4 per cent in 1900 to almost 40 per cent by the end of the twentieth century (Uhlenberg 1996). Similarly, the proportion of US adults who could expect to still have living grandparents when they reached age 30 rose from around one-fifth in 1900 to three-quarters in the 2000s. Astoundingly, in the 2000s it was ‘more likely that 20-year-olds alive now have a grandmother still living (91 per cent) than that 20-year-olds alive in 1900 had a mother still living (83 per cent)’ (Uhlenberg 1996, p. 685). Those simple figures suggest that the mortality

'revolution' has contributed to a steady rise in multigenerational co-survivorship over extended periods of people's lives. While the supply of living grandparents for children has risen, the 'supply' of grandchildren for older people has fallen as a result of concurrent declines in fertility levels. For example, according to an analysis performed by Uhlenberg and Kirby (1998), among US women aged 60 to 64, the mean number of grandchildren had decreased from about 12 in 1900 to about six in 1980. All of these estimates were generated based on demographic 'period data', i.e., researchers used period life table and period fertility data to provide a 'synthetic picture' of the changes in the demographic context of the grandparent–grandchild relationship. Nonetheless, these findings suggest that multigenerational family structures, and grandparenthood in particular, have undergone substantial changes over the past century.

Other studies have employed survey data to study the demography of grandparenthood, and especially the age at which the transition to grandparenthood typically occurs. Szinovacz's (1998b) analysis based on data from the National Survey of Families in Households (US) collected in the early 1990s is one of the pioneering works on this topic. Her findings suggest that grandparenthood was a nearly universal and typical mid-life experience, and that many individuals had surviving grandparents up to their late 20s. However, the evidence that families spanning four generations (relationships between great-grandparents and great-grandchildren) were becoming increasingly common, which is one of the predictions of the popular 'beanpole family' theory, was limited. Notably, Szinovacz (1998b) provided for the first time results on the timing of the transition to grandparenthood in the US, thereby addressing the putatively simple, but previously unexplored question of at what point in the life course people actually become grandparents. The availability of the National Survey of Families in Households data made it possible to investigate this question, because the questionnaire included an item on the age of the oldest grandchildren, which provides a viable marker for reconstructing the age at which an individual became a grandparent for the first time. Based on these data, she estimated that the mean age at first-time grandparenthood was 46 for women and 49 for men. Thus, her findings characterised the passage into grandparenthood as a mid-life event that often occurs long before retirement. Subsequent analyses estimated that the mean age at which people transitioned to grandparenthood was 54 for women and 57 for men in Canada (Kemp 2003), and was 52 for women and 55 for men in the Netherlands (Dykstra and Komter 2006). Methodologically, however, many of these earlier survey estimates were problematic, as they were prone to several sorts of bias. Perhaps most importantly, simple mean estimates calculated only for those who were grandparents at the time of the interview can be seen as naïve underestimations of the age at grandparenthood, because they suffered from a right-censoring bias (i.e., they ignored all of the people who may have experienced the transition to grandparenthood after the survey interview). Furthermore, as the survey data only included information on survivors, a left-censoring bias might have occurred if the levels and the timing of fertility (of individuals and their offspring) correlated with mortality risks. In addition, due to data limitations, Kemp's estimates for the timing of grandparenthood had to draw on responses from the middle generation (i.e., the parent's age at the birth of the respondent's first child). This may have caused a systematic upward bias in estimates of the age at grandparenthood, because the childbirths of the respondents' siblings (which may have occurred earlier) were not considered.

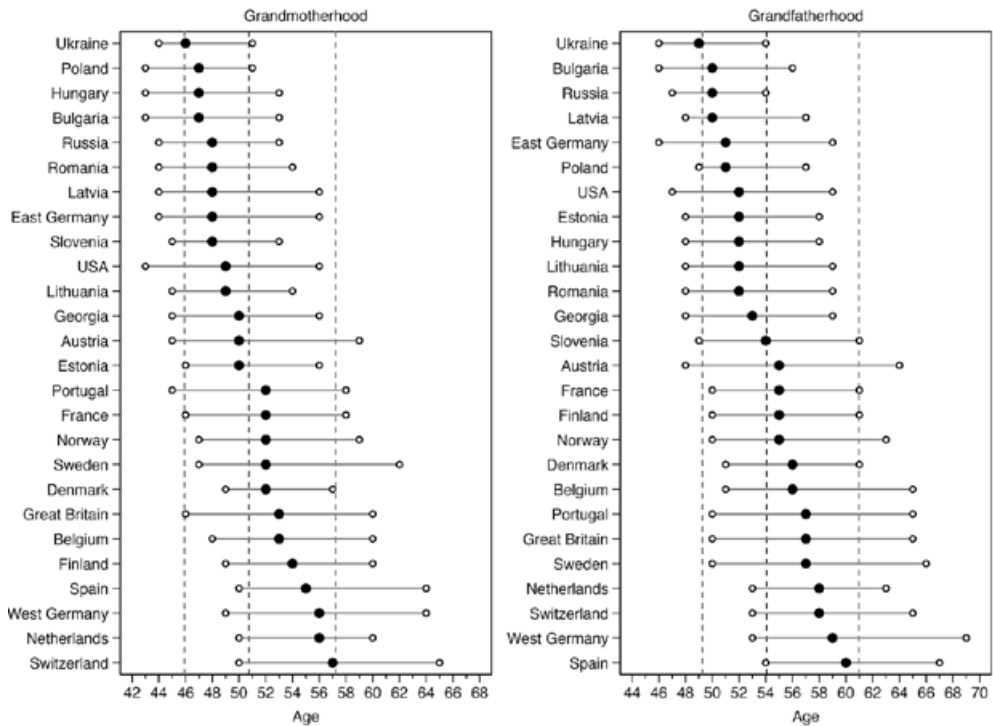
Up to now, the most comprehensive analysis of the transition to grandparenthood has been provided by Leopold and Skopek in a recent series of studies that assessed (a) international variation in the transition to grandparenthood, and where the transition to grandparenthood

fits in the sequence of other transitions that typically occur in mid- and later life (Leopold and Skopek 2015b); (b) cohort changes in the transition to grandparenthood (Leopold and Skopek 2015a); and (c) how educational attainment affects the prevalence and the timing of grandparenthood (Skopek and Leopold 2017). In contrast to previous survey data studies that were largely cross-sectional and focused on North America or single countries, Leopold and Skopek's analyses provided for the first time results on the demography of grandparenthood in various European countries. Moreover, in order to reduce bias related to survey estimates, the authors proposed specific sample designs to ensure that the analysis included only those individuals who were 'at risk' of experiencing grandparenthood, and used survival time methods, which tend to be more reliable for handling right-censored transition data.

Based on data from Leopold and Skopek (2015b), Figure 17.1 displays the results of an analysis on the timing of grandparenthood in various European countries and the US by plotting the quartile ages of the estimated distribution of the ages at the transition to grandparenthood. The figure shows that among people who ever had children, the median age at the transition to grandparenthood was 51 for women and around 54 for men; and that by age 57 for women and by age 61 for men, three-quarters of people who had ever had children had become grandparents. The analysis also found considerable cross-national heterogeneity in the distribution of the ages at which individuals experienced the transition to grandparenthood. For example, the results showed that in Ukraine (as in other Eastern European countries), mothers typically became grandmothers in their mid-40s, whereas in West Germany and Switzerland, mothers became grandmothers 10 or more years later, when they were in their mid- or late 50s. Furthermore, the findings put the previously researched case of the US in a cross-national context by showing that in Eastern European countries, the median age at the transition to grandparenthood is roughly as low as it is in the US. Thus, these comparative findings demonstrate that results based on data from North America cannot be easily generalised to the more heterogeneous national contexts of Europe. Leopold and Skopek (2015b) also provided evidence of cross-national heterogeneity in the life course contexts in which the transition to grandparenthood is experienced by men and women. For example, they found that in Eastern Europe, many people who became grandparents were still active parents of minor children, were still co-residing with their own children, and/or were in the mid-life stages of their work careers. Moreover, they showed many of the women who became grandmothers still had living mothers. Yet they also found that in western continental Europe, grandparenthood generally occurred in an entirely different life course context. In these countries, most people became grandparents at a time in life when their own parents were deceased, their children were grown up and had left home, and they were preparing to retire. Taken together, these findings imply that how the grandparenthood role is typically experienced and fulfilled might differ considerably across countries. Although we focus here on gender and country differences, it should be noted that there is also considerable social heterogeneity in grandparenthood outcomes (Arpino et al. 2017; Skopek and Leopold 2017).

Finally, at the current time, there is almost no representative survey research that has addressed the question of how the transition to grandparenthood has been changing over time. An exception is Leopold and Skopek (2015a), who analysed German cohorts born from 1929 to 1958 using data from the German Ageing Survey. Based on the methodology of Leopold and Skopek (2015b), the study estimated that there was an approximate three-month delay per cohort year in the age at first-time grandparenthood. Those delays implied that the typical age range at the transition to grandmotherhood went from late 40s to mid-50s among women in

East Germany, and from mid-50s to early 60s among women in West Germany. Drawing on a period rather than cohort approach, Margolis (2016) found similar trends for Canada.



Note: Quartile ages at the transition to grandparenthood. From left to right: 25 per cent quartile (early grandparenthood), 50 per cent quartile or median age (on-time grandparenthood), 75 per cent quartile (late grandparenthood). Dashed vertical lines show average quartile ages ($N = 26$ countries) accordingly. Cohorts born in the 1930s and 1940s.

Source: Data based on Leopold and Skopek (2015b).

Figure 17.1 Age at the transition to grandparenthood for European countries and the United States

2.2 Duration of Grandparenthood

Family sociologists have often hypothesised that the increasing longevity of parents, grandparents, and great-grandparents has enlarged multigenerational co-survivorship, and has thus increased the number of years generations spend together (Bengtson 2001). However, the extent to which we actually observe a prolongation of the grandparenthood phase is an empirical question, as longevity gains might be offset by concurrent (multigenerational) delays in fertility that have, in turn, led to delays in the transition to grandparenthood. Nonetheless, the validity of Bengtson's hypothesis has rarely been empirically studied (Herlofson and Hagestad 2011). In particular, the length of multigenerational relationships and exposures, and the numbers of years between multiple generations, are among the least explored issues of multigenerational demography (Margolis and Verdery 2019).

Taking the difference between life expectancy at age 60 and the median age at the transition to grandparenthood, Leopold and Skopek (2015b) provided a crude but simple measure for estimating the expected length of grandparenthood for their study population (birth cohorts of the 1930s and 1940s). In addition to observing gender differences – i.e., that grandmotherhood generally lasts longer than grandfatherhood, because women are often younger when they first enter parenthood and have higher life expectancy than men – they found substantial cross-national variation in the length of the grandparent phase, with the longest phases found for East Germany (36 years for women and 29 years for men) and the US (34 years for women and 28 years for men), and the shortest phases found for West Germany, the Netherlands, and Switzerland (about 28 years for women, and 21–23 years for men). Moreover, they showed that later grandparenthood correlated substantially with higher life expectancy at the country level (0.72 for women and 0.79 for men), which suggests that higher life expectancy does not necessarily imply that more years of life are shared across multiple generations. However, as these findings were limited to a certain cohort range, they did not provide information about changes in the duration of grandparenthood.

Margolis (2016) was the first to present a systematic analysis of the possible changes in the length of the grandparent phase. Notably, using the Sullivan method, she combined cross-sectional survey data for Canada on the prevalence of grandparenthood status with data from period life tables to calculate the remaining years spent in grandparenthood. Her results demonstrated that from 1985 to 2011, grandparenthood was substantially delayed as a result of fertility postponement across two generations. However, it also turned out that those delays did not greatly affect the expected length of grandparenthood – about 24 years for women and 19 years for men – as declines in mortality rates meant that grandparents could expect to live longer. Thus, it appears that the combined effects of declines in fertility and in mortality have simply moved the grandparent phase to later years in life. Subsequent analyses have shown that this shift in the grandparent phase to older ages has not been accompanied by poor health, as the length of healthy grandparenthood has also been increasing (Margolis and Wright 2017). These findings suggest that the compression of morbidity has outpaced the postponement of grandparenthood (Margolis and Iciaszczyk 2015). The differences between the estimates of the length of grandparenthood in Margolis (2016) and in Leopold and Skopek (2015b) highlight some of the methodological challenges involved in the estimation of multigenerational indicators. The latter use a cohort approach and base their calculations on parents only (since, logically, only parents can become biological grandparents). As Margolis' period-based method takes into account all individuals (regardless of whether they are at risk of becoming grandparents), the use of this approach inflates the denominator and leads to lower duration estimates. Margolis and Verdery (2019) discuss this 'denominator problem' in more detail.

In a remarkable study of Finnish church records from the eighteenth to the twentieth century, Chapman et al. (2017) looked at how grandparenthood changed over a 170-year period. In their analysis, they were also able to distinguish between prospective (from the perspective of the grandparents) and retrospective (from the perspective of the grandchildren) views on grandparenthood. They found that over the observation period, the number of years of life grandparents and grandchildren shared had increased substantially. For example, the results indicated that from the pre-industrial to the post-World War II cohorts, the average number of years a child had at least one living grandmother went from around five to about 24; and the average number of years a grandmother had at least one living grandchild increased from approximately 12 to more than 25.

Two of the most recent studies on the demography of grandparenthood and multigenerational relations were again based on data from the US. Combining historical vital statistics with stable population kinship models (Goodman et al. 1974), Song and Mare (2019) analysed the impact of fertility and mortality trends on the mutual exposure of grandparents and grandchildren in the US from 1900 to 2010. Their findings indicated that there had been a substantial enlargement of multigenerational exposure in the first half of the twentieth century in the US. For example, they found that the average number of years of life grandparents could expect to share with at least one grandchild rose from five in 1900 to about 35 in 1950 and later. They also showed that over the same period, the average number of years of life grandchildren could expect to share with at least one grandparent rose from 21 to 25. These trends were mainly attributable to substantial declines in mortality rates. While Song and Mare's (2019) study relied on period data, Margolis and Verdery (2019) used for the first time a cohort perspective based on micro-simulations to examine racial differences in the changing demography of grandparenthood. While cohort measures on grandparenthood are generally limited to older cohorts, they can provide a more accurate picture than period approximations of how grandparenthood is unfolding over people's lives and successive cohorts. The results of these simulations suggested that the proportion of individuals with living grandparents had increased substantially as a result of mortality declines. However, the analysis also showed that the proportion of the population who never became a grandparent because of childlessness (their own or their offspring's) had increased as well. The findings indicated that among grandparents, the age at the transition to grandparenthood had been increasing, whereas the overall number of grandchildren had been sharply declining. Moreover, the study found that the length of the grandparenthood phase had increased substantially over the studied cohorts. While the results uncovered considerable heterogeneity by gender and race, they also showed that racial differences in grandparenthood experiences decreased substantially over the cohorts.

The available evidence suggests that there have been significant changes in the demographic trends in grandparenthood and in multigenerational relations. Changes in mortality and fertility are the two primary but opposing macro-demographic forces underpinning those changes. Thus, it is clear that declines in mortality have made the experience of grandparenthood more likely, and have increased the supply of living grandparents for younger generations. Research on the length of the grandparenthood phase indicates that as mortality declines have more than compensated for concurrent delays in fertility, grandparents and grandchildren are spending more years of life together than they did in the past. However, the literature review suggests this trend towards more years of shared life might have stalled.

3. DEMOGRAPHIC TRENDS IN GRANDPARENTHOOD ACROSS EUROPE

As the previous review has shown, we are just beginning to understand how the demography of intergenerational relations has been changing. This is especially the case for European societies, for which we have only fragmented evidence. Therefore, in the remainder of this chapter, I will present demographic approximations of how the experiences of grandparenthood might have changed in selected European countries. As there were no appropriate survey data for the task at hand, I derived multiple indicators on multigenerational relations based on demographic kinship theory (Caswell 2019; Goodman et al. 1974; Keyfitz and Caswell

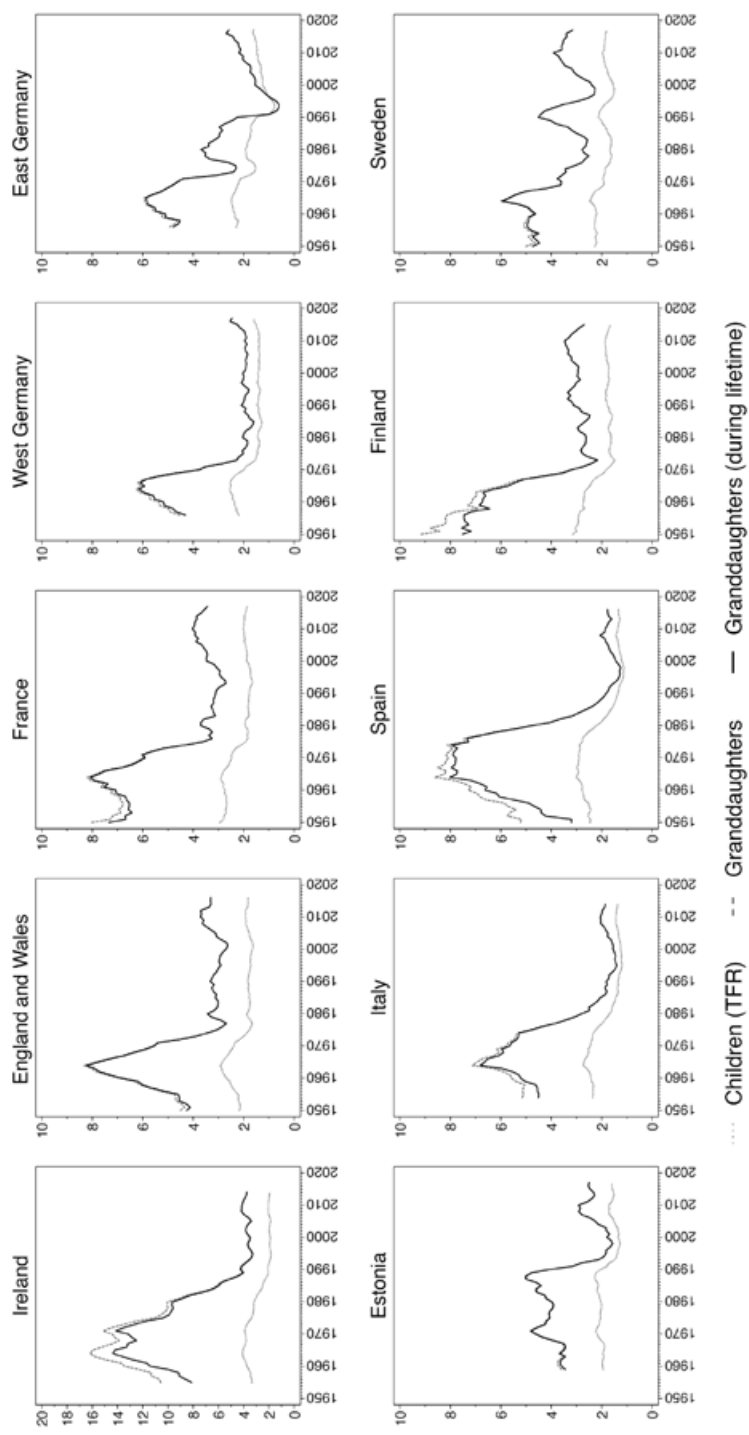
2005; Margolis and Verdery 2019; Song and Mare 2019): i.e., the supply of grandchildren, the timing of grandparenthood, the supply of grandparents, and the shared lifetime across generations. While I provide a short and non-technical description of the methods here, formal details can be found in the Appendix.

The proposed indicators cover both prospective (from the perspective of the grandparents) and retrospective (from the perspective of the grandchildren) viewpoints, which are needed to understand changes in the demography of multigenerational relations. The indicators were calculated using period data on female fertility and mortality schedules for nine countries, and for periods from the 1950s to the 2010s, which were retrieved from the Human Fertility and Human Mortality databases (HFD 2019; HMD 2019). It should be noted that due to the absence of male fertility data, all of the calculations refer to female lineages only (women bearing daughters who in turn bear daughters). Thus, in the analysis that follows, grandmotherhood is used as a proxy for grandparenthood. Furthermore, all of the numbers presented here are calculated based on general age-specific fertility rates, because parity-specific fertility data were not available for all countries and periods.¹ Obviously, elaborations based on kinship models and period data are limited, and must be seen as approximations, and not as exact estimations. Nonetheless, in the absence of actual observational data, they provide a viable tool for exploring the question of how multigenerational relationships might have been changing over the past six decades in Europe. Moreover, such elaborations are helpful devices to determine empirically how changes in fertility and longevity have been affecting grandparent–grandchild relations in contemporary European societies.

3.1 Supply of Granddaughters

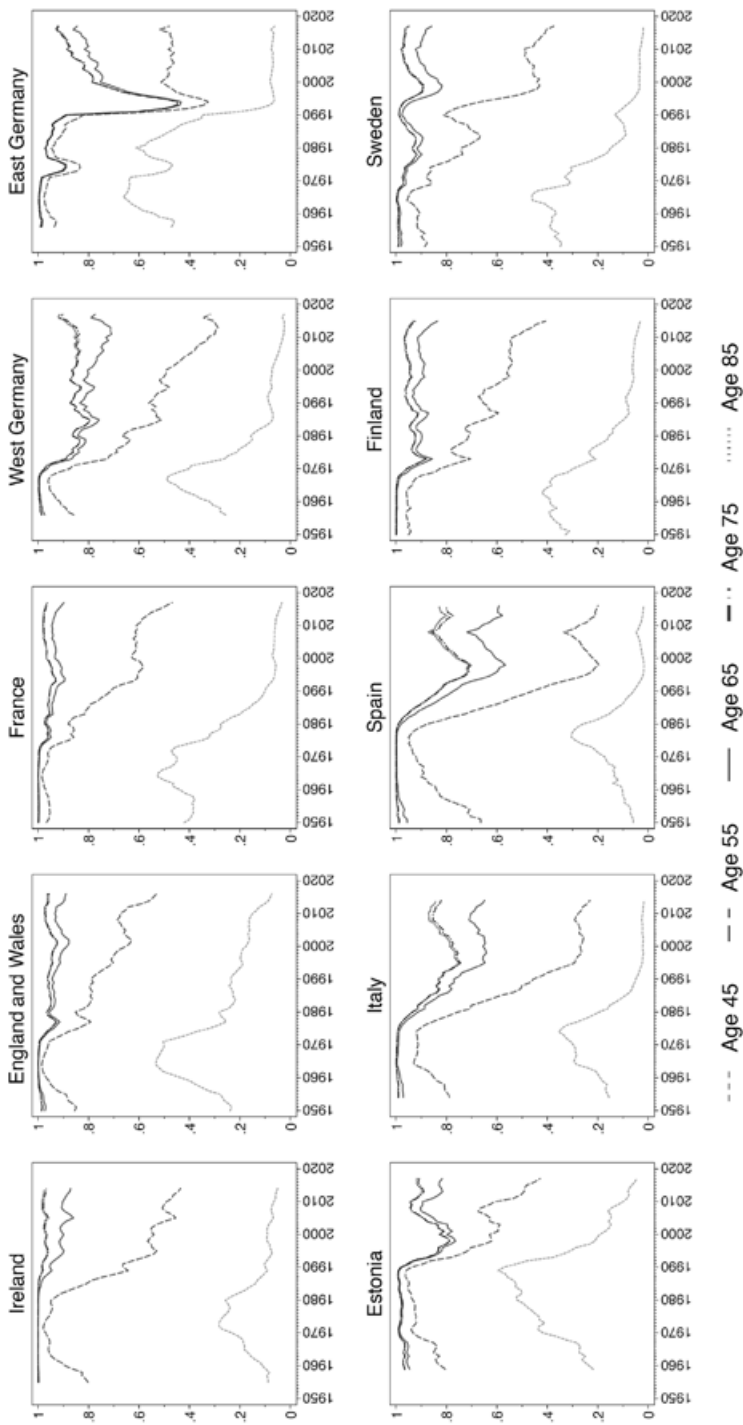
First, we inspect the trends in the supply of grandchildren. Figure 17.2 shows period approximations for the expected number of granddaughters of a hypothetical woman (who bears only female offspring, and who, in turn, bear only girls).² For purposes of comparison, the figure also depicts the period fertility (total fertility rate). It should be noted that Germany is treated here and in the following analysis as two distinct regions: East and West. This is because Germany is known to have differences in fertility patterns related to its historic legacy of separation (Goldstein and Kreyenfeld 2011; Kreyenfeld 2003) that still resonate in contemporary patterns of grandparenthood in the two parts of the country (Leopold and Skopek 2015a).

The trends in period fertility (see also the chapter by Sobotka and Berghammer) are mirrored in the period ‘supply’ of grandchildren. As a consequence of declining birth rates, the ‘birth rates’ of grandchildren are declining as well. These changes appear to be most extreme for Ireland, where the average number of grandchildren each grandmother had declined sharply from about 16 (about 14 during her lifetime) in the mid-1960s to barely four in the 2010s. Based on 2014 fertility and mortality rates, women in France and in Ireland could expect to have the highest numbers of grandchildren (3.7 and 3.9, respectively), followed by women in Sweden (3.5) and England (3.3); while women in Spain and Italy ranked lowest in terms of ‘grandchild supply’, as they could expect to have fewer than two grandchildren (1.7 and 1.9, respectively). In sum, as the observed fertility declines imply that the number of grandchildren women are having is decreasing drastically, women are expected to experience a decline in multigenerational family ties over their lifetimes.



Note: Enlarged ordinate scale for Ireland. Children (TFR) = total fertility rate. Granddaughters = expected number of granddaughters born to a woman. Granddaughters (during lifetime) = expected number of granddaughters born during the (expected) lifetime of a woman.

Figure 17.2 'Supply' of grandchildren, trends in fertility, and mean number of granddaughters per woman



Note: A woman's probability of having at least one living granddaughter by age and period.

Figure 17.3 Trends in the age-specific probabilities of being a grandmother

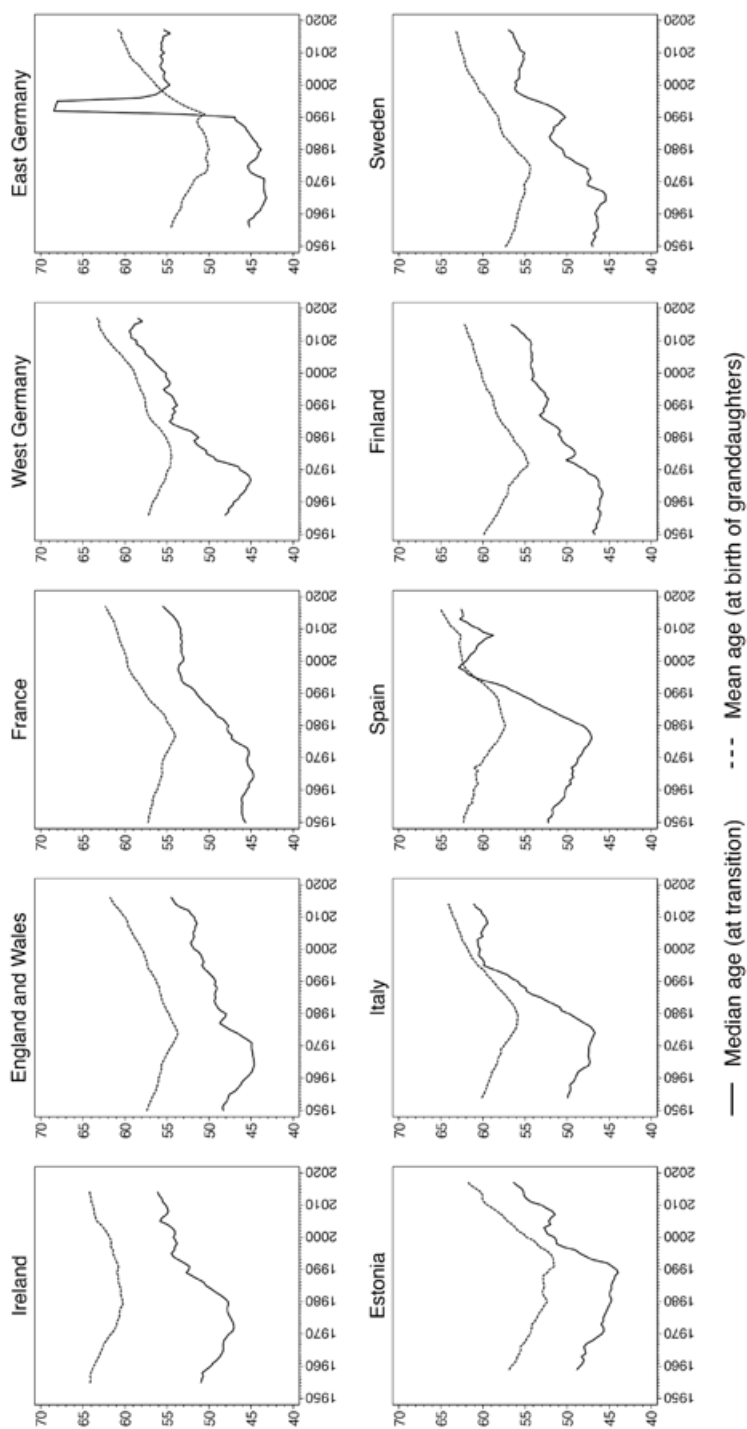
3.2 Prevalence and Timing of Grandmotherhood

How has the prevalence of grandparenthood changed over time? Figure 17.3 displays women's probabilities of being a grandmother (i.e., having at least one living granddaughter) by age and period. For all countries, the probabilities of grandmotherhood have decreased substantially, particularly at younger ages. The figure shows, for example, that while a woman's probability of having living grandchildren by the age of 55 was between 80 and 90 per cent in the 1960s and 1970s, this probability fell below 50 per cent – and even below 30 per cent for the Mediterranean countries – in the 2010s. Moreover, over all age groups, Spain and Italy stand out as having the lowest prevalence of grandmotherhood, while Ireland, England, and France have the highest prevalence. Summing up, we found that in successive periods, the prevalence of the grandmother role in the female population has been declining, particularly at younger ages.

The age at grandparenthood is another indicator for the demography of grandparenthood and of multigenerational relations. Figure 17.4 plots the median age at the transition to grandmotherhood (the age at which 50 per cent of women are expected to be a grandmother), as well as the average age at the birth of a granddaughter. While the age at childbirth declined from the early 1950s to the 1970s, it has been continuously rising since the 1980s in most European countries (Frejka and Sobotka 2008). Those delays in childbirth imply substantial delays in the age at the transition to grandparenthood. Figure 17.4 shows that the average age at the transition to grandmotherhood has been rising since the 1960s and the 1970s, except in the post-socialist countries (Estonia and East Germany), where the age did not start to increase until the late 1980s. Thus, over the last 40 years, the ages at which women experience the births of their grandchildren have risen substantially.

3.3 Duration of Grandmotherhood

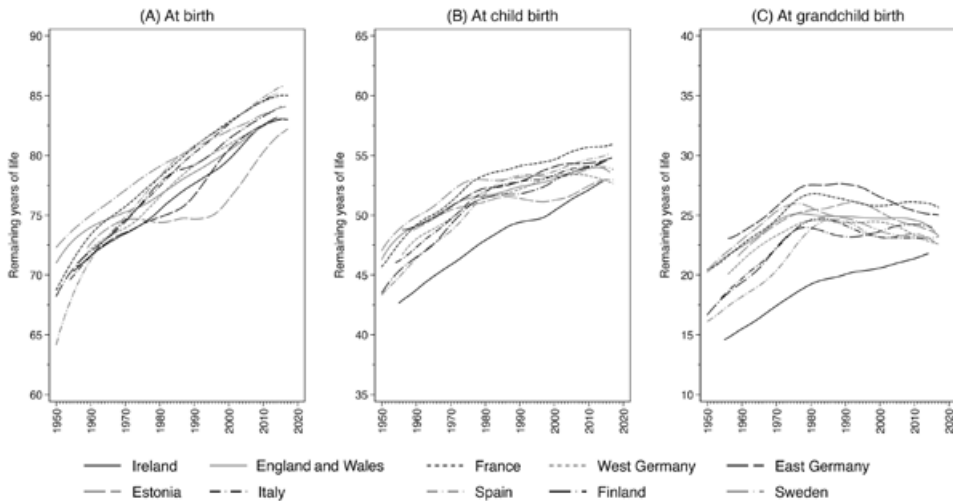
While fertility predominantly determines the availability of living children and grandchildren, mortality predominantly determines the availability of living ancestors, such as parents and grandparents, as well as the number of years of life generations might share. Figure 17.5 summarises the changes in female longevity evaluated at three age points: at birth (life expectancy), at the average age when a daughter is born, and at the average age when a granddaughter is born. The numbers for the remaining years of life at the average age at the birth of a child and of a grandchild serve as indicators for the expected duration of motherhood and grandmotherhood.³ We first note the constant increase in life expectancy at birth from the 1950s (about 70 years) until today. Second, we observe that although this shift is less pronounced, the remaining years of life from the mean age at childbirth have also increased for all countries, which suggests that a woman alive today is likely to spend a larger share of her lifetime with her children than a woman in the past. Finally, we see that those upward trends do not quite hold for the remaining years of life at the birth of a woman's grandchild. Although a woman's remaining life expectancy at the birth of a grandchild was increasing up to the 1970s, in most countries (with the exception of Ireland), it has since remained unchanged or even declined. More precisely, those period approximations suggest that the expected lifetime



Note: Median age (at transition) = the age at which 50 per cent of women are grandmothers. Mean age (at birth of granddaughters) = the average age at which granddaughters are born.

Figure 17.4 *Trends in the age at grandmotherhood*

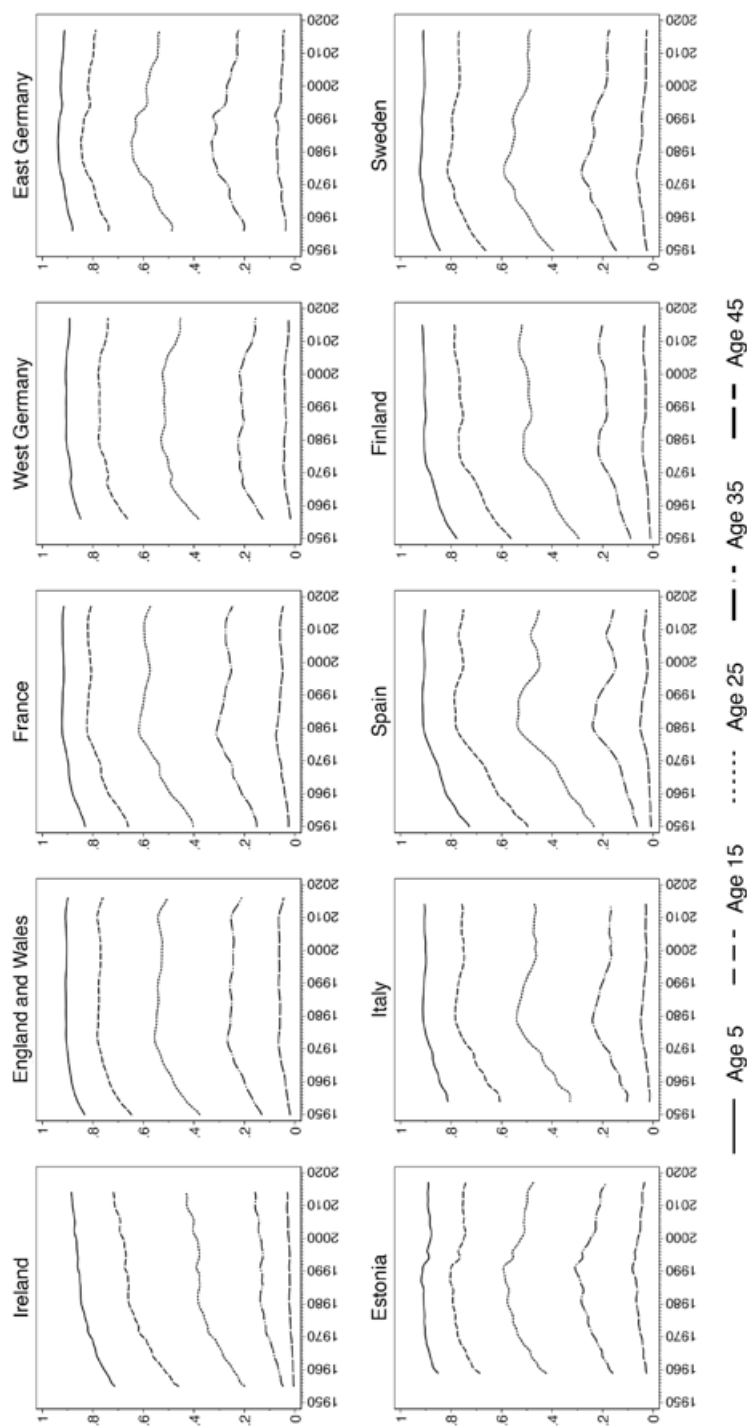
spent as a grandmother has been around 25 years (except in Ireland) for the last four decades. This pattern indicates that the positive effects of increasing longevity on the number of years of life grandmothers could share with their grandchildren might have been cancelled out by the opposite effects of reduced and delayed fertility.



Note: Remaining years of life at birth = life expectancy at birth. Remaining years at child birth (average age at birth of children) = duration of motherhood. Remaining years at grandchild birth (average age at birth of granddaughters) = duration of grandmotherhood. Time series smoothed.

Figure 17.5 Remaining years of life at birth, childbirth, and grandchild birth

When we look at these questions from the perspective of the grandchildren, we can ask what the probability is of having living grandparents at various ages. We would expect to find that reduced mortality has increased the 'supply' of living grandparents for the younger generations. Figure 17.6 plots a woman's (and a girl's) probability of having a living (maternal) grandmother at different ages. We can see that the probability of having a living grandmother increased from the 1950s to the 1970s, but that for the later periods, this trend seems to have stalled or even reversed for most countries. These findings indicate, for example, that in Italy, the share of young women who had a living grandmother at age 25 was slightly higher than 30 per cent, and that this share had increased to almost 55 per cent by 1980, but had declined to less than 50 per cent by 2015. An exception to this general pattern was found for Ireland, where the age-specific probabilities of having a living grandmother have increased steadily. It appears that the rise in the average age at childbirth and the corresponding delay in grandparenthood has counteracted the increase in longevity in most countries. In sum, we can state that after some initial increases, the supply of grandparents has not changed for minor children since the 1970s, while the chances of having living grandparents may have even declined for adults.



Note: A girl's or woman's probability of having a living (maternal grandmother) by age. Time series smoothed.

Figure 17.6 'Supply' of grandparents – probability of having a living (maternal) grandmother by age and period

4. DISCUSSION AND CONCLUSION

Multigenerational relations are attracting increasing scholarly attention, as the surge in the number of studies on grandparenthood indicates. In this chapter, I highlighted the conceptual and the methodological progress that has been made in the study of grandparenthood over the last decades. There have been advancements in methods, such as employing survival analysis, formal demography, and micro-simulation. In addition, the availability of survey data that include information on the ‘timing’ of grandparenthood has been increasing. Nonetheless, apart from cursory references to changes in grandparenthood, studies that have attempted to investigate the changing demographic fabric of grandparenthood and multigenerational relations are still rare. After reviewing the scant and mainly North American-centric literature, I discussed in this chapter the shortage of research on the changing demography of grandparenthood in European societies.

Against this backdrop, I used demographic kinship models to construct a series of multigenerational period indicators that allowed me to assess trends in the demography of grandparenthood over the past 60 years in nine European countries. The findings revealed that demographic changes in multigenerational relations have been more complex than was previously assumed. The trends for European countries are frequently non-linear, and often differ across countries. Nonetheless, three general patterns emerged. First, the ‘supply’ of grandchildren – and, therefore, the numbers of multigenerational family ties that women (who were the focus of the analysis) experience over their lifetimes – have decreased substantially over time. Second, the age at which the typical woman experiences grandparenthood has increased steadily, and the population prevalence of grandparenthood has declined accordingly for all age groups. Third, ‘multigenerational lifetime exposure’ – approximated here by the expected duration of grandparenthood and the age-specific probability of having living grandparents – does not seem to follow a consistent trend. Whereas reduced mortality has tended to increase the shared years of life of grandchildren and grandparents, pronounced delays in the age at the transition to grandparenthood and reductions in the number of grandchildren seem to have offset these positive longevity effects to a considerable extent. The demographic approximations conducted in this chapter suggest that although the years of life shared by grandparents and their grandchildren had initially been rising starting in the 1950s, the level of shared lifetime remained largely unchanged, and has in some cases even declined over the past four decades. However, it is possible that multigenerational exposure might start increasing again in the future if longevity continues to increase and the trends towards (lowest-)low fertility are reversed (Goldstein et al. 2009; Kontis et al. 2017). Nonetheless, despite the stalled gains in shared lifetime between the generations, the decline in the ‘supply’ of grandchildren might have altered many aspects of the grandparent–grandchild relationship. If grandparents have fewer grandchildren, they may develop stronger emotional bonds with particular grandchildren. In addition, the monetary and non-monetary resources of the grandparents will be shared by fewer children.

NOTES

1. More refined analyses incorporating parity-specific data would be able to approximate levels of childlessness and, consequentially, grandchildlessness.
2. Note that the period indicators may be affected by tempo effects (see Sobotka and Berghammer in this volume).

3. It is important to keep in mind that as the analyses presented here cannot distinguish parities (the order of childbirths), they have to incorporate the age at any (grand)child birth rather than the age at the first (grand)child birth. As a consequence, these approximations necessarily understate the actual duration of motherhood and grandmotherhood. Nonetheless, these numbers can be used to explore trend patterns in the respective durations.

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APPENDIX

All indicators are developed based on demographic theory using the kinship model proposed by Goodman et al. (1974) as a point of departure (see also Keyfitz and Caswell 2005, p. 381; and for recent extensions, Song and Mare 2019). The ‘GKP’ model provides a systematic and formal framework for the demographic analysis of the frequency of various kinds of kin – such as the number of siblings, the number of grandchildren, or the probability of having living grandparents – based on specified birth and death rates. Based on this model, the *expected number of living granddaughters* (here, daughters of daughters) for a woman of age a is defined as

$$D_2(a) = \int_a^a \left[\int_a^{a-x} l(y) m(y) l(a-x-y) dy \right] m(x) dx \quad (17A.1)$$

with the minimum childbearing age α , woman’s fertility function $m(x)$, daughter’s fertility function $m(y)$, daughter’s survival up to childbearing $l(y)$, and granddaughters’ survival up to the time the woman is of age $l(a-x-y)$. Note that $m(x)dx$ is the number of daughters a woman is expected to bear over interval dx and $l(x)$ is a woman’s probability of surviving up to age x . For my analysis, I use a slight modification of (17A.1) to measure the number of grandchildren a woman is expected to have during her expected lifetime. This measure integrates over a woman’s and her (surviving) daughters’ fertility function up to the woman’s life expectancy at birth e_0 , and does not depend on the granddaughters’ survival:

$$N_2 = \int_a^{e_0} \left[\int_a^{e_0-x} l(y) m(y) dy \right] m(x) dx \quad (17A.2)$$

Modelling a woman’s number of grandchildren by a Poisson distribution (see Song and Mare 2019), the *probability of being a grandmother* (i.e., the probability of having at least one living granddaughter) at age a can be written as the inverted probability of having no granddaughters

$$P_2(a) = 1 - e^{-D_2(a)} \quad (17A.3)$$

In addition, I evaluate the *mean age at the birth of granddaughters*. The mean age of the childbearing function $m(x)$, the expected age of a woman at childbirth, is (see Keyfitz and Caswell 2005, pp. 386–7)

$$A_1 = \int_a^\beta x m(x) dx \left[\int_a^\beta m(x) dx \right]^{-1} \quad (17A.4)$$

the α being the earliest and β being the latest age at childbirth. Correspondingly, the mean age at the birth of granddaughters for a woman at age 2β (i.e., when her youngest daughters had given birth to their youngest daughters) is

$$A_2 = \left[\int_a^{2\beta} \left[\int_a^{2\beta-x} l(y) m(y) dy \right] m(x) x dx \right] \left[\left[\int_a^{2\beta} \left[\int_a^{2\beta-x} l(y) m(y) dy \right] m(x) dx \right] \right]^{-1} \quad (17A.5)$$

To have a better indicator for the timing of the transition to grandparenthood in the population of women, we can calculate the median age at which a woman is expected to become a grandmother. Reusing the Poisson assumption from (17A.3), we define the median age as the age A_2^M at which the probability of being a grandmother (of living or deceased grandchildren) equals 0.5:

$$1 - \exp \left\{ - \int_a^{A_2^M} \left[\int_a^{A_2^M - x} l(y) m(y) dy \right] m(x) dx \right\} = 0.5 \quad (17A.6)$$

To measure the supply of grandparents, the probability of having grandparents at different ages is evaluated. The probability of a girl or a woman having a living mother at age a is defined as (see Keyfitz and Caswell 2005, pp. 373–5)

$$M_1(a) = \int_a^\beta \frac{l(x+a)}{l(x)} e^{-rx} l(x) m(x) dx \quad (17A.7)$$

with r being the intrinsic rate of population growth in a stable population (featuring fertility regime $m(x)$ and mortality regime $l(x)$). Correspondingly, the *probability of having a living (maternal) grandmother* at some age a is (Keyfitz and Caswell 2005, p. 375)

$$M_2(a) = \int_a^\beta M_1(x+a) e^{-rx} l(x) m(x) dx \quad (17A.8)$$

Using the equations above, I calculated multigenerational indicators for grandparent–grandchild relations based on historical fertility and mortality data in Europe. The period data on fertility and mortality came from the Human Fertility Database (HFD 2019) and the Human Mortality Database (HMD 2019). To keep the number of countries analysed manageable, but to nonetheless ensure adequate coverage of the variety of European welfare states, I decided to include the following 10 analytical cases (covering nine countries) for which sufficient data were available: England (and Wales) and Ireland (the liberal cluster), France and West Germany (central/continental), Estonia and East Germany (post-socialist), Italy and Spain (Mediterranean), and Finland and Sweden (Nordic regimes). Note that Germany must be treated as two distinct cases, as it is well known that the historical legacy of the separation of the country into East and West Germany is associated with differences in fertility.

As the Human Fertility Database provides only female fertility data, the analysis had to be restricted to female family lineages only. Note also that $D_2(a)$ (17A.1) depicts only the expected number of living granddaughters in the maternal lineage. However, to calculate the overall number of living grandchildren, we would need to combine female with male data on fertility and mortality. If males equalled the fertility and mortality schedules of females, the overall number of living grandchildren would simply be $D_2(a) \times 4$. Alternatively, $D_2(a) \times 4$ would be the expected number of grandchildren for a *hypothetical woman* who bears only daughters, and her daughters have only daughters too. It is this number that we will be evaluating in the results part. Note that the approximation made by those demographic models builds upon general age-specific fertility rates. While more refined models could incorporate parity-specific fertility data, such data are not available for all of the countries and periods under study.

The equations presented above define integrals and age-continuous functions for fertility and survival data. In practice, vital data, such as age-specific fertility (calculated from birth rates) and survival (calculated from death rates) data, are provided in discrete (annual) form. Therefore, the integral must be approximated numerically. Since numerical integration over nested integrals for 10 cases, each with about 60 periods, is computationally unreasonably expensive, I used Caswell's more efficient matrix method (Caswell 2019; Keyfitz and Caswell 2005), and a related MATLAB program that was recently provided by Caswell (2019).

18. Children and parents after separation

Ulrike Zartler

1. INTRODUCTION TO POST-DIVORCE PARENT–CHILD RELATIONS

In recent years, the divorce rates in some European countries have levelled off, or have even declined. However, pointing to this trend may give a misleading impression of family stability, because cohabiting unions – which are on the rise, and are often less stable than marital unions – are not included in these statistics (Cherlin 2017; see also Mortelmans in this volume). Life table estimations based on the Generations and Gender Survey for 19 countries have revealed considerable variation across countries in the proportions of children who experience a parental separation or divorce¹ before reaching age 15 (Andersson et al. 2017): these shares are highest in the United States, at 44 per cent, and in the Russian Federation, at 42 per cent; are around one-third in France, Estonia, Lithuania, and the Czech Republic; are slightly higher than 20 per cent in Nordic and Central European countries; and are lowest in Southern European countries, at around 10 per cent. In all European countries, the chances of experiencing a parental separation are higher for children born to parents who are cohabiting rather than to parents who are married. Divorce and separation change children's and parents' lives in various ways.

A parental break-up is associated with numerous changes, including the need to reorganise relations between the parents and their children. In some countries, shared legal custody is the default custody arrangement after separation and divorce. In other countries, child custody is a matter of negotiation between the parents. Thus, the parents have to decide whether their children will live mainly with one parent (the so-called residential parent), or whether they will practise shared parenting. This implies that the parents have to find ways to organise multi-local parenting. If the child primarily lives with one parent, contact with the non-resident parent must be organised. In addition, the dissolution of a union entails significant changes in the financial situations of the parents, and often leads to a decline in the standard of living of the mother in particular (see the chapter by Mortelmans). If the parents re-partner, family complexity will increase further. Thus, after their partnership has been terminated, parents face pressure to find ways to maintain emotional bonds with their offspring, and to sustain their parental relationship with their children. Meanwhile, the children are having to adapt to a large number of divorce-related changes to their lives, and to the introduction of new rules and routines.

This contribution sheds light on the relationships between children and their parents after a parental break-up. The main questions I address are as follows: How do children and parents relate to one another after a divorce, and what challenges do they face in adjusting to their new situations? In this chapter, I consider the effects of the dissolution of marital and cohabiting unions on parent–child relations. While my main focus is on research from Europe, I also take into account results from the United States, where a large number of studies on this topic have been carried out. The chapter is structured as follows: first, I describe the key theoretical

approaches that seek to explain post-divorce parent–child relations. In the subsequent section, I present the main results of empirical studies on the impact of divorce on children, parents, and parent–child relations. I then discuss some of the major challenges children and parents encounter after a divorce. These challenges include difficulties obtaining and providing adequate information, normative disadvantages, management of post-separation family lives, multiple transitions, and family complexity. Moreover, I outline in a separate section the issues surrounding custody and contact after parental divorce. I close this contribution with a short summary of my findings, and some recommendations for future lines of research.

2. THEORETICAL APPROACHES

From a theoretical point of view, divorce has long been regarded as a discrete, negative, normatively undesirable event that disrupts family life and leads to disorganisation. This view has shifted towards a conceptualisation of divorce as a gradual and complex process that begins long before the legal divorce and unfolds over time, reshaping and restructuring family relationships (Amato 2000). In this framing, divorce does not result in disorganisation, but in a reorganisation and a transition of the family system. Thus, just as the post-divorce family arrangements may contribute to more positive or negative outcomes, the pre-divorce family environment also affects how children and parents adjust to divorce.

The focus of family sociology has shifted from cross-sectional research of family structures – i.e., how parents and children are related in their family or household – to the analysis of family instability and family transitions. Accordingly, recent research on separation and divorce has been paying more attention than previous studies to the transitions from one family structure to another. In this vein, the *family instability hypothesis* focuses on family transitions that occur when a parent forms or dissolves a partnership. It conceptualises parental divorce and separation as the first step in a series of family developments that contribute to instability via the formation and break-up of new unions; and, from the perspective of the child, via the acquisition of stepparents, half-siblings, and/or stepsiblings (Amato 2010; Fomby and Cherlin 2007; Hadfield et al. 2018; Osborne and McLanahan 2007; Shafer et al. 2017). The instability hypothesis suggests that family transitions are stressful events that lead to adverse developmental outcomes for parents and children. Hence, a large number of studies have shown that divorce and separation are stressful transitions for parents and children alike. Parents who are in the process of divorcing often experience emotional tension, task and responsibility overload, financial drawbacks, and difficulties maintaining positive parent–child relationships. These burdens can make it hard for parents to provide their children with a consistent routine and a stable family environment. Apart from observing their parents' stress and dealing with a decline in their standard of living, the children of divorcing parents may experience feelings of insecurity, fear, anger, loyalty conflicts, guilt, or self-blame (Birnbaum and Saini 2012).

In line with this approach, the *divorce-stress-adjustment perspective* explores the effects of stress on families undergoing a break-up (Amato 2000): events that adults and children experience as stressful, or 'stressors', increase their risk of negative emotional, behavioural, and health outcomes. Potential stressors for divorcing parents include having to take on the sole responsibility for parenting, losing custody of their children, dealing with the loss of emotional support, and managing continuing conflict with the ex-spouse. Potential stressors for children of divorcing parents include having less parental support overall, having less

contact with one parent, and dealing with continuing conflict between their parents; as well as having to move to another home or school, and resulting changes in their social networks. Furthermore, the economic strain and the decline in living standards associated with divorce causes hardships for both parents and children. However, there are also protective factors, or 'moderators', that can weaken the negative impact of stressors following a divorce. These moderators are socio-economic, individual, interpersonal, and structural resources that can reduce the negative effects of divorce and separation. Potential moderators include positive social and legal support when undergoing divorce or separation, and favourable demographic characteristics. Although divorce and separation can have long-term economic, mental health, and social consequences, most children and parents recover from and adapt to the break-up in the medium term (Amato 2010).

Family instability and complexity is theoretically connected with the concept of *family boundary ambiguity*, which refers to a state in which family members 'are uncertain in their perception about who is in or out of the family and who is performing what roles and tasks within the family system' (Boss and Greenberg 1984, p. 536). This concept acknowledges that family structure is not an 'objective' fact, as it may be perceived differently by different members of the household or family. For example, when people who live in the same household are asked who is part of the family, they often give different and sometimes contradictory responses, especially if they are involved in stepfamilies or post-divorce families (Castrén and Widmer 2015; Zartler 2011). Brown and Manning (2009) showed for the United States that the greater the family complexity, the more likely it was that the family structure reported by an adolescent deviated from that of his/her mother. In cases in which the mothers reported living in a married stepfamily, only 70 per cent of the children reported living in the same family structure. This pattern was most pronounced for cohabiting stepfamilies, among whom there was agreement in only one-third of cases. From a theoretical perspective, these findings suggest that divorce and separation may exacerbate boundary ambiguity, which could, in turn, make post-divorce reorganisation more difficult. The lack of clarity about family membership has been shown to be associated with family stress, reduced feelings of belonging or connectedness, lower couple relationship quality, diminished parental involvement, increased levels of parental conflict, dissatisfaction with parenting, and reduced child well-being (Brown and Manning 2009; Stewart 2005).

The instability hypothesis is often contrasted with the *selection hypothesis*, which states that the relationship between family transitions and child outcomes is spurious, as both are caused by the parental characteristics that are correlated with divorce and separation, like their educational levels, occupational status, or socio-economic status (Cherlin 1999; Fomby and Cherlin 2007). According to this 'selection perspective', parents neither divorce at random nor choose post-divorce family forms or residence models at random. Instead, the selection into divorce and separation is assumed to be the driver for adverse outcomes of parental separation. Evidence has been found for both perspectives (instability and selection), with the bulk of studies supporting the basic notion that divorce and separation negatively affect both children and adults (Amato 2010). Overall, scholarly research has become increasingly aware of the aspect of selection, even though it is virtually impossible to identify causal effects as such. A recent systematic review pointed to the need for a thorough empirical and theoretical differentiation between different events, like relationship formation and dissolution and fathers' and mothers' transitions; and argued in favour of recognising a wider range of outcomes and of contexts (Hadfield et al. 2018).

The parents' socio-economic status and the resources they provide for their children are among the most intensively discussed issues related to divorce outcomes. The availability of resources can determine how well families deal with transitions. However, even children from families with adequate resources may experience substantial losses when their parents separate (Bernardi et al. 2019). The post-divorce losses of resources and their moderating roles are captured in the *parental resource theory*, which states that parents provide their children with two major resources: money, which meets the children's economic needs; and time, which allows parents to be involved in their children's lives, and to build strong parent-child relationships (Thomson et al. 1994). From this perspective, parental separation leads to a decline in both resources, as it reduces the involvement of the non-residential parent. When children lose access to the economic and social capital of one of their parents, their outcomes may be negatively affected. Thus, Sara McLanahan argued that family complexity may be seen from the perspective of '*diverging destinies*' (McLanahan 2004; McLanahan and Jacobsen 2015). According to this perspective, children born to less educated mothers are especially likely to experience changes in family structure that are associated with a loss of resources, including early family formation, lower levels of paternal involvement, parental union dissolution, and weaker labour market attachment. The opposite pattern is observed for children born to highly educated mothers, who tend to benefit from their parents' later family formation, greater union stability, higher levels of paternal involvement, and stronger labour market attachment. As a consequence of these dynamics, parental divorce and separation affect the outcomes of children who are already socio-economically disadvantaged more than the outcomes of advantaged children, and lead to even greater disparities between these groups. In the long run, this accumulation of disadvantages produces further drawbacks over the life course and across generations among children with lower socio-economic status, while already privileged children continue to accumulate advantages.

3. IMPACT OF DIVORCE AND SEPARATION ON CHILDREN, PARENTS, AND THEIR RELATIONS

When parents divorce or separate, both the children and the parents need to adjust to the new situation. Numerous studies have linked parental divorce to children suffering from decreased emotional and psychological well-being, behavioural problems, lower educational achievement, impaired parental caregiving, and decreased economic resources and standards of living (Amato 2010; Bjarnason et al. 2012; Fomby and Cherlin 2007; Härkönen et al. 2017; Perkins 2019; Raley and Sweeney 2020). In the long run, (adult) children whose parents divorce have, on average, less frequent contact and a lower quality relationship with their non-resident parent (Amato and Cheadle 2005; Kalmijn 2015b). In addition, parental divorce leads to intergenerational transmission effects: i.e., children whose parents divorce are more likely to experience divorce in their own partnerships (Amato and Patterson 2017; Arocho 2019; Brown and Manning 2009; Wolfinger 2011). Moreover, rising rates of 'grey divorces' among older couples increasingly affect intergenerational solidarity between (adult) children and their divorced parents (Brown and Lin 2012).

Overall, there is 'a substantial degree of variability in children's outcomes following parental divorce, with some children declining, others improving, and most not changing at all' (Amato and Anthony 2014, p. 370). The average effects have been shown to be modest

in magnitude and temporary, with most children and parents adjusting well over the medium term (Amato 2010; Raley and Sweeney 2020). However, the heterogeneity of such effects should be considered: i.e., the negative outcomes of parental separation tend to be concentrated among children from lower class families, while parents with more socio-economic resources seem to be better able to buffer their children from the detrimental effects of divorce (Amato and Anthony 2014; Grätz 2015).

Another essential question that arises in this context is whether increasing divorce and separation rates facilitate adaptation processes. The underlying assumption is that parental divorce and separation may be less stigmatised when it is more common. However, there is some evidence suggesting that the negative effects of a parental break-up on children can be even greater when divorce occurs in more families, as rising proportions of divorces are low-conflict break-ups. Children who are not exposed to parental conflict, tension, or hostility may find their parents' divorce especially hard to take, as it often comes as a surprise (Birnbaum and Saini 2012). While parental divorce can be beneficial in families with high levels of parental conflict (the so-called *stress relief hypothesis*), children from low-conflict families are more likely to be negatively affected by a parental break-up (Härkönen et al. 2017). Thus, when divorce becomes more common among low-conflict couples, more children will be negatively affected, and hence, the average effect of parental dissolution will become more negative (Kreidl et al. 2017).

4. CHALLENGES FOR CHILDREN AND PARENTS IN POST-DIVORCE FAMILIES

Dealing with a parental divorce or separation can put pressure on the parents, their children, and parent–child relations. The challenges these families face include having to cope with normative discrimination, preparations for (spatial) separation, the reorganisation of everyday family life, multiple transitions, and increased family complexity.

As divorce and separation rates have risen, family forms such as single-parent families and stepfamilies have become more common. It is often assumed that the social stigma attached to these family forms has decreased as their numbers have grown. However, several studies have found that the *nuclear family ideology* remains strong, and that attitudes towards parental separation, children of divorce, and non-nuclear family forms continue to be negative (Marschall 2016; Saint-Jacques et al. 2020; Zartler 2014). The powerful image of the nuclear family – two parents residing with their biological children – still affects people's ideas about how families should be composed, and how they ought to work. Normative understandings based on the nuclear family ideology disadvantage families who diverge from this iconic image, which is constructed in terms of deficits. Thus, non-nuclear families still have to deal with negative stereotypes.

In the preparation phase of a break-up, the parents are under pressure to find solutions for a broad range of issues, including questions regarding residence, custody, contact, and finances. From the perspective of the children, the demanding process of family reorganisation can feel less onerous if the children are given adequate, age-appropriate, and timely information about the divorce. Thus, receiving such information can ease the children's feelings of fear, anger, or guilt. Studies have shown that most children want to be better informed about the separation process and the consequences of their parents' separation for their own lives

(Birnbaum and Saini 2012). Among the challenges divorcing parents face is finding the right words to inform their offspring of the break-up; to reassure them that the termination of the partner relationship will not change their love for their children; to explain in a child-friendly manner the reasons for the divorce; and to let the children know that their parents' decision to get divorced was not their fault.

Another major challenge parents and children are confronted with is the *management of post-separation family lives*. When the parents no longer reside permanently with their children, parenthood has to be practised (at least partly) at a distance. However, normative specifications and role models for such arrangements are rare. Qualitative and ethnographic studies have shown that multi-local parenting typically involves elaborated practices of presence and absence (Schier 2019). For children, shuttling between two family locations means that they are living 'double-looped' lives (Marschall 2017), and requires them to be attentive to each parent's distinct routines, expectations, demands, and parenting styles. Furthermore, practical issues – such as having all of the necessary clothing, equipment, school materials, etc. available in the right household at the right time – can make everyday life complicated for both the parents and children. Moreover, routines of coordination and communication between the households have to be established.

For children, a parental divorce can lead to many life changes, such as experiencing the departure of one parent from the household; having to move from their family home and relocate to a new neighbourhood and a new school; losing contact with their grandparents, friends, and classmates; suffering a decline in their standard of living; having to adapt to their parents' new partners or new family members, such as step or half-siblings; and having to cope with a series of subsequent parental break-ups. Accordingly, a *multiple transition* perspective treats divorce as one of a series of transitions that children may experience, with changes in the parents' partnership status representing and inducing the most influential alterations. The nature, the number, and the timing of such transitions are crucial factors in whether children are able to adapt successfully to their post-divorce living situations; especially given that each transition demands further adaptation and the renegotiation of roles and routines. According to stress theory, when children and their parents experience a large number of changes within a short time – as is often the case when the parents divorce – their stress is likely to be cumulative, which could have negative effects on their health and well-being over the longer term (Amato 2010; Amato and Sobolewski 2001; Osborne and McLanahan 2007; Raley and Sweeney 2020; Shafer et al. 2017). However, qualitative studies have shown that children and parents employ diverse strategies in an attempt to reduce the negative impact of transitions (Hadfield and Nixon 2018; Zartler 2014). Recent research has also found evidence of gender-differentiated effects: i.e., that the well-being of adolescents with divorced parents is negatively affected when their mother's post-divorce relationship history is unstable, but also when their father's post-divorce relationship history is stable (Bastais et al. 2018). This finding may be attributed to the dynamics that are set in motion by the introduction of a stepparent to the paternal household (e.g., the addition of stepsiblings, potential geographical moves or changes in custody arrangements, or the redistribution of the father's time and economic resources).

Furthermore, *family complexity* is associated with major challenges. Gaining a stepparent after a parental separation is a common experience for many children. In most European countries, around 30 to 40 per cent of children with divorced parents were living in a stepfamily within six years of the parental break-up, and more than one-third of children who were born to

a lone mother acquired a stepfather before their sixth birthday (Andersson et al. 2017). There is also evidence that the intensity of contact between non-resident parents (mostly fathers) and their children tends to decrease when either the mother or the father re-partners, and that children in stepfamilies tend to have lower well-being than those living with both biological parents (Härkönen et al. 2017). A potential explanation for these findings is that the presence of a stepparent and/or step or half-siblings makes family relationships more complex, as relationships between (new) family members and kin have to be renegotiated, a range of contact and custody agreements have to be synchronised and reorganised, family boundaries become volatile, and feelings of family belonging are challenged (Ganong and Coleman 2017). Thus, increased family complexity may exacerbate feelings of stress and concerns about family boundaries (Brown and Manning 2009; Fomby and Cherlin 2007; Shafer et al. 2017; Stewart 2005). Having a new partnership can also impose time constraints and additional responsibilities on a parent that may interfere with the family's established routines and contact agreements. Moreover, family complexity can lead to the uneven distribution of resources. For example, (step)parents are likely to put more resources into their biological children than their stepchildren, and into the children with whom they share a household than the children with whom they are no longer living (Köppen et al. 2018; Tach et al. 2014). Furthermore, a disproportionate number of stepfamilies are formed by nonmarital couples, whose unions are more likely to be unstable; and, even if such couples get married, these new unions tend to be less stable than first marriages. Thus, children living in stepfamilies face a high risk of experiencing a further separation (Cherlin 2017).

5. CUSTODY AND CONTACT AFTER PARENTAL DIVORCE

One of the most crucial and controversial issues in post-divorce families is the organisation of parental responsibilities. In most cases, a parental divorce reduces the frequency of a child's contact with the non-resident parent (usually the father). However, in recent decades, the legal construction of parental roles has changed enormously, with fathers' rights being extended, while the practice of routinely granting sole custody to the mother (and contact rights to the father) has receded. The most notable legal development in this context has been the introduction of joint legal custody in many European countries; i.e., the equal distribution of legal rights to both parents, regardless of whether they are living with the child and the legal status of their former partnership. In a joint *legal* custody arrangement, the parents have to cooperate when making important decisions concerning their child's everyday life; while in a joint *physical* custody arrangement, the child spends equal amounts of time in each parent's household. Simultaneously, in many countries, protecting the child's best interests has been elevated to the leading juridical principle in all issues regarding custody and contact rights, with the goal being to ensure that the child maintains a close relationship with both parents, even in cases in which the parental relationship is marked by conflict (Cancian et al. 2014; Zartler and Hierzer 2015).

Despite these legal changes, a majority of children whose parents divorce still spend more time in the maternal than the paternal home, and often spend shorter periods outside of the weekday routine with their father (Bjarnason and Arnarsson 2011). Overall, it is difficult to quantify the exact durations of time that children spend with each parent. While the extent of non-resident fathers' contact with their children has been intensively researched for the United

States, the United Kingdom, and Canada, there is much less evidence on this question for continental Europe (for an overview, see Kalmijn 2015a; Köppen et al. 2018). Moreover, levels of father–child contact vary greatly: while some fathers maintain frequent contact, others lose contact completely. In his study of 14-year-old children living in four European countries (England, Germany, the Netherlands, Sweden), Kalmijn (2015a) showed that the majority of children had good or very good ties to their father, while one in six children did not see their father at all. Furthermore, contact frequency tends to decrease with increasing duration since the separation. In seeking to explain this heterogeneity, the existing research has, for example, observed that fathers who have co-resided with the mother of their children prior to the separation, who have been married, who are highly educated and socio-economically advantaged, and who have joint legal custody are more likely than fathers who lack these characteristics to remain involved in their children’s lives after separation (Kalmijn 2015a; Köppen et al. 2018; Tach et al. 2014).

Emotionally satisfying parent–child relationships are beneficial for parents and children. Although regular contact appears to be helpful in maintaining father–child bonds and developing an orderly routine, pre-divorce parental involvement, rather than post-divorce contact frequency, appears to be the main factor in the quality of such relationships. Thus, a child’s well-being depends heavily on the level of paternal involvement in childrearing before the parental break-up, and a child is likely to benefit from regular contact with his/her father only if the father’s level of pre-divorce involvement was medium or high. Thus, ‘it is not so much the frequency of contact per se that matters for child well-being but, rather, the extent to which post-divorce residence arrangements reflect predivorce parenting arrangements’ (Poortman 2018, p. 671). Apart from the sheer quantity of contact, qualitative aspects of the contact are also important, such as the quality of the father–child relationship, and how the father and child spend their time together (Palkovitz 2019). In addition to examining what makes parent–child relationships satisfying, research has identified the co-parental relationship as a key factor in children’s well-being and adjustment levels after divorce (Amato 2000; Becher et al. 2019). Cooperative co-parenting that facilitates both parents’ positive involvement in their child’s life seems to be more suitable than parallel parenting, which is characterised by low communication and high conflict levels. However, the notion that a cooperative co-parental relationship represents a ‘good divorce’, and can protect children comprehensively from negative outcomes, has been challenged (Amato et al. 2011). Thus, it is clear that for most children, divorce is an unwanted and often painful experience.

A crucial component of post-divorce family reorganisation is the division of the time the child spends with each parent. There are different legal models of physical custody that have been designed with the child’s best interests in mind. However, opinions about which of these custody models are best suited to meeting this goal have changed substantially in recent years. As the legal understanding of the child’s position and of parent–child relations has evolved, custodial arrangements after a divorce no longer automatically follow the standard model of sole custody (mainly by mothers), and are increasingly likely to follow the joint physical custody or shared residence model, in which the child spends (approximately) equal amounts of time with both parents, usually defined as a ratio of 50:50 up to a ratio of 70:30. In some countries that have a longer history of shared residence and established joint physical custody as the primary legal custodial arrangement, such as Belgium or Sweden, the share of child custody cases with joint physical custody arrangements is 30 per cent or higher; while in other countries, this share is much lower, at 10 to 15 per cent (Steinbach 2019). In a study

based on the child's perspective, Bjarnason and Arnarsson (2011) showed that in 29 out of 36 Western countries, 1 per cent or less of all children aged 11, 13, and 15 years were spending equal amounts of time with their mother and father in two separate households. This share was about 2 per cent in Norway, the United Kingdom, Canada, and the United States; 3 per cent in Belgium, Denmark, and Iceland; and 4 per cent in Sweden. The study also found that shared residence was mainly practised when the child was attending primary school or in early adolescence. Overall, it appears that this model is used by a highly selective group of parents characterised by low levels of conflict, high levels of parental involvement, high educational attainment and socio-economic status, and comprehensive economic resources (Poortman and van Gaalen 2017; Steinbach 2019).

In terms of consequences, several meta-analyses have shown that shared residence can have positive effects on the well-being of children and their parents (Baude et al. 2016; Bauseman 2012; Nielsen 2014; Smyth 2017; Steinbach 2019), and can be beneficial for post-divorce parent-child relationships in terms of communication and support (Bastaitis and Pasteels 2019). While this is generally the case if parents cooperate and have low levels of conflict, there is scholarly disagreement about the impact of joint physical custody on children if the parents do not cooperate or have ongoing conflicts. Most studies that have examined this question have found that parents, and fathers in particular, are more satisfied with shared residence than children; and that children in joint physical custody arrangements seem to fare as well or slightly better than children in sole physical custody arrangements (Steinbach 2019). Overall, the differences in the effects of the different residence models tend to be modest. Studies that have captured children's perspectives have observed that while such arrangements make it easier for children to maintain satisfying relationships with both parents, they are also associated with high logistical demands and high levels of stress due to ongoing adaptation processes and limited social interconnections between the two households, and that children would like to have more flexibility and participation regarding custody schedules and arrangements than their parents realise (Marschall 2017; Merla 2018; Zartler and Grillenberger 2017; Kitterød and Lidén 2020).

In sum, a wide range of factors should be considered when assessing the merits of physical custody arrangements, and individual solutions should be adapted to each family's specific situation. Moreover, agreements must be adapted over time as children grow older, and their needs and daily routines change. It is difficult to generalise the results of the existing studies on this topic, as they vary greatly in terms of the definitions used, the legal contexts, the sample sizes and data quality, the ages and the numbers of the children studied, and the duration of shared residence covered. Furthermore, knowledge about alternative models, such as 'bird's nest' custody (in which the parents move between households, and the children remain in their stable family household), is scarce to non-existent due to the low prevalence of such arrangements. Overall, the findings regarding the risks and benefits of joint physical custody are mixed or even contradictory, and thus remain unclear. In light of these results and taking into account the socio-economic selectivity associated with this custody model, policy changes that would make joint physical custody the default solution in child custody cases should be scrutinised carefully.

6. CONCLUSION

Parental divorce is always connected with major changes and transitions for both children and their parents. A plethora of studies have examined children's well-being after a parental union break-up, and concluded that a number of moderators and stressors contribute to children's healthy adaptation to these changes. While these results are not entirely coherent, they generally suggest that parental resources have a protective effect. These resources include not only the parents' socio-economic status, but their ability and willingness to communicate and co-parent effectively. Even though a parental break-up has some long-term consequences for families, most children and parents who experience such disruptions adapt to their new situations in the medium run. However, additional transitions that lead to more family complexity can be difficult for family members, leading to increasing stress, family boundary ambiguity, and reduced well-being. Post-divorce families face numerous challenges, such as dealing with normative disadvantages, parent-child communication prior to the divorce, and management of post-separation family arrangements. Establishing contact and custody arrangements is among the primary issues parents have to negotiate in order to maintain emotionally satisfying bonds with their children, and to support their well-being. Overall, there is no 'one size fits all' solution for all post-separation families, and physical custody arrangements have to be adapted to each family's particular needs. As these arrangements also need to be modified over time, a continuous process of negotiation between the separated parents is indispensable, which places additional pressure on post-divorce families. Research has shown that the lives of children and parents are interwoven even when they are no longer part of the same household, and that interconnections of their 'linked lives' persist across the life course well into adulthood.

It is essential to recognise that *the* divorce does not exist, just as there is no such thing as *the* post-divorce family or *the* parent-child relationship after parental break-up. As the processes that lead up to divorce and that accompany its aftermath vary considerably, post-divorce families are also very different. Like all other families, these families are the meeting ground of 'multiple realities' (Larson and Richards 1995, p. 189), especially in cases of conflict. This is an important point, as focusing on an imagined 'average' of transitions, causes, or effects hides the differences that exist between and within post-divorce families. Therefore, future research is needed to capture, reconstruct, and interpret the different experiences and standpoints of individual family members, as well as the heterogeneity within and between families. The differences in how well children and their parents adjust following a parental divorce also require further explanation. In addition, more research is needed on the similarities or disparities between different types of separation (e.g., low- or high-conflict break-ups; unexpected divorces versus those that were long anticipated) and their implications over the life course. At the same time, the enormous heterogeneity of custody and contact arrangements, and how they affect the everyday lives of families, are issues that demand scholarly attention. Furthermore, how separations affect families in different social, legal, and normative contexts and in different geographical regions should be examined. Moreover, geographical distances between parental households need to be considered, as a child's divorced parents can live as close as on the same street, or as far away as in different countries, requiring hours-long trips by train, car, or airplane.

Solving the heterogeneity puzzle raises a number of questions, including the following: How do the consequences of a parental break-up for children differ depending on whether it is a formal divorce or the separation of an informal cohabiting union? How do the consequences

of a parental break-up for children differ depending on whether the break-up is of a stepfamily or of their biological parents? In precisely what ways do multiple transitions impose strains on children and parents; and, conversely, how, why, and under what circumstances is stability beneficial? How are resources such as money and time distributed between different sets of children in complex post-divorce families, and what criteria are used to do so? How are legal arrangements negotiated with different family members, and how and to what extent do children participate in parental decisions about custody, care, and contact? How do children and parents manage great geographical distances, or even the desire to relocate a child from one country to another?

Examining complex families and blurred family boundaries is methodologically challenging. As scholars are increasingly recognising that children are active and competent actors in their own right, it is becoming more common to include children's perspectives in research. However, as divorce is a sensitive issue, scholars who wish to study it need the right methodological tools and competence, and adequate resources. Future research on divorce should try to capture the perspectives and experiences not only of the divorcing partners and their children, but of other family members. Moreover, while it is generally acknowledged that divorce is a process, empirical research on divorce often focuses on the event, and is usually based on cross-sectional data. In order to better capture the dynamics of divorce and to analyse the evolution of post-divorce family relationships over time, future research should adopt a longitudinal approach.

NOTE

1. In this chapter, the terms (parental) divorce and separation – i.e., dissolution of marital and non-marital unions – are used interchangeably. While there are fundamental legal differences between divorce and separation, many of their consequences for parent–child relations are similar.

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19. Emotions, love, and sexuality in committed relationships

Karl Lenz and Marina A. Adler

1. INTRODUCTION

In contemporary societies, love and sexuality are probably most strongly associated with marriage and with other couple relationships. Thus, it may seem surprising that, until recently, love and sexuality have remained at the margins of family studies (Lenz 2009). Love, which was described by Austrian writer Musil (1989, p. 1219) as the most talkative emotion of all, and which has been written and sung about ad infinitum, may have been too ‘corny’ or fluid a concept to invite scientific analysis. The reluctance to consider sexuality as a sociological topic may stem from its association with the intimate sphere, which was deemed an area that other disciplines, such as psychology, were better suited to investigate.

In everyday life, love and sexuality appear to be strongly connected. Yet within sociological discourse, emotion and sexuality belong to separate research areas. In this overview, we introduce both strands of literature, trace the origins of these concepts and their definitions, and summarise sociological studies on the topic of love (and emotions) and sexuality. We focus on love and sexuality in committed relationships, which are defined here as long-term relationships, such as marriage, cohabiting unions, and stable living-apart-together relationships (Schwartz et al. 2013). The most common relationship form is the couple, which can be composed of partners with any gender identity and sexual orientation. In Europe, the expectation that couples will practise monogamy – including serial monogamy – remains strong, even though this norm may be violated, and forms of consensual non-monogamy (for example, polyamory) are also practised (Boehm 2012; Sheff and Tesene 2015). Biographies in which the partners meet at a young age and remain in their first relationship for life are becoming rare. Thus, individuals may enter a series of successive relationships over their life course, which may be marital or non-marital unions.

2. EMOTIONS AND EMOTION WORK

Love, and other emotions such as jealousy, grief, and anger, have been largely neglected by sociology, apart from in some preparatory work by the sociological classics (e.g., Simmel 2004). It was not until the 1970s that the topic of emotions became more prevalent in sociology (Stets and Turner 2007, 2014). Historically, emotions were considered ‘intraindividual’, and, therefore, unsuitable for sociological analysis. Moreover, even psychology has had a distant relationship to emotions (Ulich and Mayring 2003). Both of these disciplines have struggled with this topic because they are rooted in the predominant scientific image of humans as rational beings. Consequently, emotions were considered to be merely an irrational relic (Plamper 2012). This simplistic dichotomy between mind and feeling has lost much of its

persuasiveness today. The clear limits of this perspective and the fragility of the rationality argument have led to a rediscovery of feelings as a scientific topic. Recently, numerous fields of research beyond that of personal relationships have begun to take emotions into account (Korte 2015). Indeed, interest in examining emotions has grown beyond sociology, and includes all of the social sciences and humanities (e.g., Frevert 2009; Matt and Stearns 2014).

In order to facilitate this scholarly interest in emotions, the organism model, which emerged at the beginning of emotions research (e.g., through the studies of Charles Darwin), had to be critiqued and rejected. According to this model, emotions are relegated to the realm of the physical human body, and are understood as genetically pre-programmed biophysiological processes. The social sciences and the humanities agree that emotions involve a coordinated interaction of physical and mental components (Gebauer et al. 2017), and encompass (peripheral) physiological responses, such as sweating and rapid heartbeat. These physical reactions often occur unintentionally, and the subjective feeling exists even if it is not verbally communicated (e.g., in newborns). From a socio-cultural perspective, however, emotions transcend biological processes. Constructivist emotions research shows that emotions are also socio-cultural phenomena (Gordon 1990). While this perspective does not deny the possibility of universal feelings and universally assigned patterns of expression (Scheve 2017), it insists that reducing social and cultural factors to the mere activation of already established emotional components is inadequate. Rather, proponents of this perspective contend that socio-cultural factors significantly affect the primary development of subjective feelings and facial expressions. Thus, emotions are considered to be interwoven into social contexts, and are generated and shaped in social processes that provide their specific meanings. It is further posited that emotional qualities are formed in historically contingent discourses and social practices.

Emotion work refers to the deliberate regulation of emotions. According to Hochschild (1979), ‘surface-acting’ refers to the emotional expression considered appropriate, while ‘deep-acting’ – or ‘emotion work’ – involves a corresponding change in the feeling itself. Emotion work can involve ‘evoking’ or ‘suppressing’ a feeling, and is guided by ‘feeling rules’, which are connected to cultural discourses. Hochschild (1983) provided several examples of emotion work in professional and family settings. The study of emotion work is now a large and productive area in couples research (Levenson et al. 2014).

Emotions and emotion work in committed relationships are gendered. Erickson (2005) observed that for women, the performance of emotion work is primarily perceived as instrumental work; while for men, the willingness to engage in emotion work reflects the particular attachment to a partner. Kaufmann (2007) showed that anger in everyday interactions arises from gendered standards of cleanliness and from disagreements over the division of labour. Furthermore, certain relationship stages, such as separation, are strongly associated with emotions (Kayser and Rao 2006). These emotions may include grief and anger; but also guilt and self-loathing, feelings of failure and loneliness, as well as euphoria. Both parts of the separation process – i.e., leaving and being abandoned – produce emotions.

The feeling of jealousy is particularly strongly associated with intimate relationships (Ben-Ze’ev 2010). Simmel (1992 [1908]) pointed to the potentially destructive effects of jealousy. It is well documented that feelings of jealousy can have serious negative consequences, such as motivating assaults and homicides (Puente and Cohen 2003). While jealousy is considered a universal feeling, it takes different forms and results from diverse actions in specific societies and historical eras (Reiss 1986). This variation is based on ideas of exclusivity and ownership enshrined in relationship norms and related power relations. Stearns (1989) and

Clanton (1989) examined the changes in cultural norms associated with jealousy. However, little is known about how jealousy plays out in everyday life. Empirical studies on polyamory (e.g., Pieper and Bauer 2014) can help address this research gap. In this relationship model, which is based on the premise that love for and intimacy with multiple partners should be lived openly and consensually, coping with jealousy is inevitable.

3. WHAT IS LOVE?

Philosophical contemplations of love in Western intellectual history, such as Plato's *Symposium* featuring speeches on eros, suggest that love is not limited to couples. This thought is clearly reflected in Christian discourse, in which pure love that is free of desire and directed at God is central. In late antiquity, a 'ban on lust' (Le Goff 1995) was propagated by Augustine. As a result, love and sexual desire became opposites, and the juxtaposition of 'high' and 'low' love gained popularity in cultural history (Lenz et al. 2013). Despite the differences in the objects of love – which may include neighbours and material things – attempts have been made to generate a unified concept of love. Demmerling and Landwehr (2007) identified three structural features of love: (1) the desire to be close to the object; (2) being focused on the lover's needs and on what they yearn for; and (3) the lack of rational justifications for the choice. While this broad conceptualisation of love is also found in sociology (e.g., Simmel 2004), it is mainly applied to committed relationships (Burkart 2018).

The question of whether love is an emotion at all has been widely discussed (Felmlee and Sprecher 2007). The arguments against this being the case are that: (1) love is merely a cultural form of a primary sexual aspiration; (2) love, like happiness, is a meta-emotion that enhances feelings, and is not like basic emotions, such as fear, which are associated with universal facial expressions; and (3) love is mainly a goal-oriented motivational state. In addition, if love continues to be perceived as a feeling, it may primarily be so because of its accidental and unintentional character (Demmerling and Landwehr 2007), and because it aligns with everyday views (Fehr and Russell 1984). However, much of the sociological literature on love focuses not on the feeling, but on the relationship that is characterised by it (Seebach 2017).

There are also different views on the question of whether love is a universal emotion. For example, Tomlinson et al. (2018, p. 407) wrote:

Romantic love seems to be a universal phenomenon, appearing in every culture for which data are available ... and in every historical era ... Analogs to romantic love are found in a wide variety of higher animal species, and love may well have played a central role in shaping human evolution.

Social psychological attempts to capture love empirically are also grounded in this perspective. For example, Rubin (1970) proposed scales that distinguish between 'loving' and 'liking'. Moreover, Hendrick and Hendrick (1986), following the Canadian sociologist Lee (1973), differentiated six forms of love: 'eros' as a romantic sensual pleasure; 'ludus' as a playful type of love; 'storge' as a friendship-based love; and three other secondary types ('mania', 'pragma', and 'agape'). Also common in this literature are efforts to draw a distinction between passionate and companionate love (Sprecher and Regan 1998). Sternberg's (1986) theory assumes that love includes three components (intimacy, commitment, and passion), which in different combinations result in various forms of love.

In contrast to this essentialist view, sociology considers love as a culture-bound phenomenon (Plamper 2012). This thesis rejects the centuries-long ethnocentric conception of love as universal (Endleman 1989). Thus, attention is shifted to observing the love discourse and the social practice of love. Central to this model are the dominant patterns that collectively determine what (real) love is in a given society in a particular historical era. Luhmann's (1986) 'Love as a Passion' examines love as a culture-bound concept. Luhmann argues that the social transformation from a stratified to a functional mode of differentiation produces profound changes in the stock of knowledge. His theoretical and historical investigation describes the emergence of romantic love semantics, in which love and sexuality are linked. For Luhmann, love is a generalised, symbolic medium of communication that facilitates the actually improbable communication within the functional system of intimate relations. His statement that love 'is not itself a feeling, but rather a code of communication' (Luhmann 1986, p. 20) suggests that love is a cultural stock of knowledge that guides how this emotion is expressed and experienced, or can be perceived or pretended. In addition, Luhmann emphasised the close connection between love and sexuality. He argues that 'no communicative system can be devised totally disregarding the physical existence of the communicators within it, and the functional specialization of a media-semantics thus requires that this physical, organic relation also be transformed into symbols' (Luhmann 1986, p. 26). According to Luhmann, symbols are 'symbiotic mechanisms'; and, in the case of love, sexuality is the symbiotic mechanism.

There is widespread agreement that the emergence of romantic love marked a decisive shift in love-related cultural norms in Europe. Romantic love refers to an idealised conception of love that emerged in the literary circles of German romanticism in the late eighteenth and early nineteenth centuries. Tyrell (1987, p. 579) described the central characteristics of romantic love as an 'unconditional preference for a particular individual person' and 'the enthusiastic elevation of precisely this matter to ... maximum relevance'. Overall, however, there is no consensus on the definition of the concept, and scholars often refer to romantic love without defining what is meant.

Since the nineteenth century, romantic love has become a tremendous cultural success (Tyrell 1987). However, the literary idea of romantic love has only gradually influenced the feeling rules for committed relationships – and only in a diluted form. Luhmann has raised the question of whether romantic love still exists in contemporary society, and concluded 'that the semantic content of "romantic" and "romanticism" has been "clandestinely replaced"' (Luhmann 1986, p. 160). While most scholars agree that romantic love semantics are undergoing a profound transformation (Lenz et al. 2013), they disagree about the direction and the extent of this change. The different arguments are as follows: romantic love is being replaced by a new love semantic (Giddens 1992); different love semantics are competing or coexisting (Koppetsch 1998); there are basic shifts within the romantic love semantic (Lenz et al. 2013); romantic meanings simultaneously increase and decrease (Scholz et al. 2013); and romantic love is increasing in importance (Beck 1995). This debate is complicated by the inconsistencies in the definitions of romantic love used. In addition, most of the above-mentioned publications on romantic love refer only to heterosexual couples (for an exception, see Gammerl 2013). In this literature, a heteronormative perspective is common, and is often unquestioned (Lenz 2018). Thus, two clearly distinguishable, mutually exclusive genders are assumed, and heterosexual desire is considered 'natural' and 'normal'. In addition, the fact that there are also relationship constellations that include more than two people remains largely unacknowledged.

Illouz's work examines the transformation of emotions and romantic life through the culture of modernity and capitalism. In *Consuming the Romantic Utopia* (1997), she describes how commodity capitalism has seized the practices of romantic love. According to Illouz, romantic love has become commodified, and a wide range of goods have been romanticised as expressions of 'true love'. Thus, romantic love has become part of the process of capitalist exploitation. Illouz (2009) also traces the rise of 'homo sentimental', as well as the emergence of psychology as the authority for interpreting emotions. More recently, she examined changes in suffering related to love, and the negative effects of sexual freedom (Illouz 2012, 2018). Illouz argues that these changes situate love in the choice of partners in a free marriage market; in the increased dependency of the modern self on recognition in the area of love; in the rationalisation of desire by psychology; in the possibilities of the internet; and in an increasing gap between one's own experiences and medial promises. According to Illouz (2012, 2018), it is above all women who suffer from the contradictory ideals of autonomy and recognition, sexual freedom, and romantic love. However, Illouz could be criticised for the gendered images emerging from this argument.

Although Illouz's focus is on the discourse level, she also incorporates the level of social practice into her work. This is done to an even greater extent by Swidler (2003), who investigates 'narratives of love' in everyday life. In her interviews, romantic love and a more practical, 'real' love became visible. Similarly, Bethmann (2013), analyses love in the multiple moments of its interactive production, and found that couples do not have a uniform love concept. Studies connecting love as a cultural pattern with love as a social practice remain rare (Lenz 2009).

4. SEXUALITY AND SOCIAL CHANGE

For a long period of time, sexuality was almost exclusively examined in relation to fertility and was only studied within the area of sexology (Sigusch 2008), which was dominated by a medical perspective. Early sexologists (Krafft-Ebing 1984 [1886]) understood sexuality mainly within the context of reproduction (Stein-Hilbers 2000). Reproduction was considered the biological goal of sexuality, and the instinctual sex drive was seen as necessary for the survival of humankind. Only sexuality that serves reproductive purposes – meaning coitus – and that takes place within the context of marriage was regarded as 'natural sexuality' (Jackson 2000). Every other form of sexuality was dismissed as a 'perversion' or an 'aberration'. Closely related to this view were essentialist assumptions about the nature of women and men. The sex drive was seen as the key feature in binary gender identity: i.e., the active, sexually driven man versus the passive, sexually disinterested woman.

By the 1970s, the dominant medical perspective had been rejected, and sexuality came to be regarded as a social phenomenon. In the course of this shift, the instinctual sex drive also lost its status as a guiding concept (Schmidt 2014). Today, sexuality is mostly seen as a resource and as a historically changing phenomenon (Benkel and Akalin 2010; Lewandowski and Koppetsch 2015). While sexology facilitated this opening towards the social sciences, the impetus for the broadening of perspectives came from external sources: (1) the newly formed field of Women's and Gender Studies deals extensively with sexuality as linked to the gender hierarchy; (2) Foucault's discourse analysis has subjected the scientific study of sexuality, including Freud's psychoanalysis, to a far-reaching critique, and has opposed the repression

hypothesis (Foucault 1977); and (3) works based on Symbolic Interactionism point to the social construction of sexual reality, and question the assumption that sexuality is bound to a sex drive (Davis 1983). Especially noteworthy is the concept of the sexual script by Gagnon and Simon (1973).

Lautmann's (2002, p. 25) definition of sexuality as a 'pleasurable encounter of bodies' acknowledges the body as the central and indispensable characteristic of sexuality; positing that in a sexual interaction, the body is the object of desire, as well as the centre of one's own experience. This definition leaves open the question of whether sexuality takes place within or outside of committed relationships, and of what forms of pleasurable experiences are being practised. Moreover, the gender and the number of those present are not specified. This definition may need to be expanded because sexuality is not always tied to the physical presence of another person and the experience of pleasure with one's own body is sufficient to be defined as sexuality. The term 'solo sex' has replaced that of masturbation (Böhm and Matthiesen 2017). This broad understanding of sexuality should be linked to society's norms of legitimate sexuality, and should include both the social context in which sexuality occurs and the sexual practices used. All societies have established rules regarding what is sexually appropriate, and individuals learn these cultural norms as part of the socialisation process. There are differences in the scope of social control exercised over sexuality, especially of female and same-sex sexuality.

Sex research is strongly centred on individuals. Although sexual activities (and fantasies) often involve the co-presence of at least – and usually only – two persons, the focus of research is not the sexual interaction, but the individual person. This is the case for both quantitative and qualitative studies. Even though 70 years have passed since Kinsey et al.'s (1948, 1953) pioneering studies were conducted, reservations about sexuality as a survey subject remain common. For some European countries, survey data on sexuality are available for the adult population, including some data from repeated cross-sectional surveys (e.g., France, the United Kingdom, Finland) (Bajos et al. 2008; Mercer et al. 2013). But this is not the case for all countries, and some have only recently started to collect data on this sensitive topic (for example, Germany) (Haversath et al. 2017; Matthiesen et al. 2018).

Most sex research provides only a snapshot of an individual's current sexual life (Sprecher et al. 2018). Both longitudinal studies and studies that take a longer-term life course perspective are lacking (Lodge 2015). An exception is the German 'Beziehungsbiografie-Studie', in which the (previous) relationships and sexual experiences of 30, 45, and 60 year olds in two German cities were compared (Schmidt et al. 2006). Qualitative studies (for example, see BZgA 2017) may also overcome the limitations of cross-sectional studies. Applying a life course perspective can clarify the effects of age and relationship duration, and how sexuality changes with relationship status. For example, an individual's sexual orientation, as well as their openness to casual and non-monogamous sex, may change over time (Carpenter 2015).

The transformation of sexuality over the last six decades is a topic that has received widespread public and academic attention. It was common to refer to a 'sexual revolution' in the late 1960s and early 1970s. The women's and the LGBTQA+ movements, the popularity of sex educational books and films, the triumph of the pill, the increase in sex scenes in movies, and the release of pornography for adults have been cited as evidence of a radical shift in sexuality. However, contemporary historical research (e.g., Herzog 2005) has since found indications that the sexual revolution is a myth (Eder 2015). Without denying that massive changes in sexuality have occurred in general, and in terms of the sexual liberation of women

in particular, it is shown that these changes were part of a longer-term process that started in the 1940s, or even earlier. In addition, the use of the revolution metaphor has been criticised, because its polarity of oppression and liberation is considered inappropriate for understanding this complex historical phenomenon.

Although these changes involved a long-term process, a ‘transformation of intimacy’ (Giddens 1992) did occur, resulting in what Giddens called a ‘plastic sexuality’. This term refers to a flexible sexuality that has freed itself from reproduction and can take on different forms. Sexuality also gained a high degree of biographical relevance, and is now integrated into the reflexive project of the self. The clear distinction between ‘normal sexuality’ and ‘perversion’ has largely disappeared. A narrow and rigid understanding of sexual normality has been replaced by a wide range of choices and arrangements. Particularly noteworthy is the advanced normalisation of LGBTQA+ sex after long being criminalised, pathologised, and stigmatised in western European countries (Lautmann 1993). This has also been the case for sexual practices. Solo sex has become a type of pleasuring that is also practised alongside or combined with sex in committed relationships (Böhm and Matthiesen 2017). The spectrum of sexual practices in relationships now includes oral and anal practices, the use of sex toys, and BDSM practices. However, heterosexuality dominates. In the British National Survey of Sexual Attitudes and Lifestyles (Natsal-III), approximately 97 per cent of women and men aged 16 to 74 identified as heterosexual (Mercer et al. 2013). The French survey (Bajos et al. 2008) and the German pilot study (Cerwenka and Brunner 2018) reported similarly high percentages. This identification does not exclude the possibility of having other sexual experiences. However, discrepancies between sexual identity and sexual behaviour are more common among LGBTQA+ individuals (Hayes et al. 2012).

The decisions about both heterosexual and LGBTQA+ sexual practices have shifted to the individual or to the couple level. Supported by the liberal discourse of the 1960s and 1970s and the self-determination discourse in the 1980s, a ‘negotiated morality’ (Schmidt 2014) in sexual activities was established that involves evaluating how sexual acts and practices come about. This requires a high degree of sensitivity to the wishes and the appropriate boundaries of the participants and consent before and during a sexual interaction. Transgressions infringe upon the ritual order, violate boundaries, and can lead to sexual assault. However, the new sexual options are not necessarily used by every couple or by every person. Thus, there are no indications of a ‘sexual decay’, as is frequently feared in conservative circles; nor of a boundless sexual zest for experimentation. Couples negotiate their sexual scripts, and decide which ones are right for them.

This transformation process has produced profound changes in female sexuality. For much of the twentieth century, a double standard persisted that allowed men to have pre- and extra-marital sexual experiences, while denying them to women by threatening them with a ruined future. This double standard resulted in marriages between sexually experienced older men and completely inexperienced young women. This pattern has fundamentally changed in Europe, except among some immigrant groups. Thus, sexuality has become a more self-determined experience for women. Some studies report that young women may even have more sexual experiences than men of the same age (Dekker and Matthiesen 2015). These findings could point to a convergence of women’s and men’s sexual experience. Thus, Kimmel (2008, p. 287) used the term ‘masculinization of sex’ to refer to ‘the pursuit of pleasure for its own sake, the increased attention to orgasm, the multiplication of sexual partners, the universal interest in sexual experimentation, and the separation of sexual behavior from love’.

Despite these enormous changes in the sexual lives of women, some gender differences persist. Differences in sexual attitudes have become less pronounced, with men being only slightly more sexually permissive than women (Klein and Brunner 2018). In adulthood, men report having more sexual activity and more partners than women (Haversath et al. 2017). It is, however, possible that these differences are exacerbated by the effects of social desirability (Alexander and Fisher 2003). Although double standards in the assessment of sexual activities by gender have been significantly reduced, they have not disappeared (Peterson and Hyde 2010; Plagge and Matthiesen 2017). The most striking gender differences continue to relate to the use of sex work services and pornography (Dekker and Matthiesen 2015). These gender differences persist because sexual interactions are associated with different risks for women and men. Unwanted pregnancy poses a risk for women's bodies and lives, and the possibility of sexual assault is mainly a danger for all those who identify as women.

In all European societies, there has been a strong liberalisation of youth sexuality (Schmidt 2014). Starting with the early 1950s birth cohorts, the age of sexual debut has decreased (Dekker and Matthiesen 2015). Massive shifts can also be observed in the commencing of sexual interactions within committed relationships (Bozon 2001). In the 1950s, at least the promise of marriage was necessary for many women to engage in sexual relations. Today, a couple's first sexual interactions tend to occur at the beginning of a committed relationship. Kaufmann (2002) uses the term 'autonomization of the sexual' when a sexual encounter marks the beginning of a potential relationship. For a growing number of couples, but not all, the 'first time' marks the possible beginning of a relationship, regardless of whether the partners have known each other for a longer time, or have just met (Lenz 2005). For the majority of couples, the first sexual interaction coincides with the formation of the couple relationship, although some couples wait until sufficient emotional trust has been established by both sides (Heßling and Bode 2016).

Cross-national studies have shown that sexual exchanges predominantly occur in committed relationships (Laumann et al. 1994; Schmidt et al. 2006). This appears to be the case for most women, regardless of their sexual orientation, and most heterosexual men. Gay men are less likely to have stable relationships, and they often live in open relationships that include sexual contacts with other men (Bochow et al. 2008; Peplau and Fingerhut 2007). Casual sex among heterosexuals mainly occurs among single people in the dating phase, and is often a strategy for finding a (new) long-term relationship (Garcia et al. 2015). The availability of mobile hook-up applications for smartphones, such as Tinder, have (to date) not led to increased casual sex practice in Europe. In the United States, the hook-up culture and 'friends with benefits' relationships seem to be much more widespread, especially at universities (Bisson and Levine 2009; Plagge and Matthiesen 2017).

As a hegemonic pattern of orientation, monogamy – which is also referred to as mono-normativity (Pieper and Bauer 2014) – is practised by most couples. This tendency is also reflected in people's attitudes. Despite the liberalisation trends, levels of acceptance for sex outside of marriage and for having a large number of sexual partners are low among women, and are even lower among men (Klein and Brunner 2018). Nevertheless, there are violations or rejections of the monogamy norm. In a survey conducted in Germany (Haversath et al. 2017), 21 per cent of men and 18 per cent of women reported ever having sexual contacts outside of their committed relationships; with 8 per cent of men and 6 per cent of women indicating that these contacts had occurred in their current relationship. Similar results, but with greater gender differences, are reported for the United States (Carr 2010). There are different

forms of external sexual contacts, such as a one-time occurrence or, primarily in men, contacts with prostitutes. Other forms of sexual contact include a new or transitional relationship during the phase of relationship dissolution, or regular external contacts or a secondary sexual relationship within a primary relationship. Most of these contacts occur in secret, or under a 'don't ask, don't tell' policy (Sheff and Tesene 2015). Additional forms of sexual contact are difficult to quantify, such as openly lived non-monogamous relationships; e.g., polyamory or swinging. Overall, however, the available evidence indicates that serial monogamy continues to be lived by most couples. The findings of the German repeat survey of students even suggest that fidelity and exclusivity have become increasingly important to German adults in the last three decades (Dekker and Matthiesen 2015). This trend has also been reported in other countries (Treas et al. 2014).

The frequency of sexual activities is highest at the beginning of a relationship, and tends to decrease over time. This does not occur in a linear fashion (Bozon 2002), but rather in leaps and bounds. The birth of the first child can lead to significant changes (Ahlborg et al. 2005; Hyde et al. 1996). This decline is often associated with reduced erotic tension. Bozon (2001, p. 16) contrasts this pattern with the ritual quality of sexuality, noting that the frequent sex at the beginning 'is entirely dedicated to the construction of the couple'; while later sex becomes a 'maintenance ritual' that 'does not require the same high frequency of intercourse as a foundations building activity' (Bozon 2001, p. 17). In the initial stages of a heterosexual relationship, there are also high levels of convergence and reciprocity between the partners. As the relationship continues, the sexual interest of and the initiative taken by the female partner in particular tend to decrease markedly (Kontula and Haavio-Mannila 1995). There are significant differences in sexual activity levels depending on the sexual identities of the couples. Sexual activity appears to be least frequent among lesbian couples (Peplau and Fingerhut 2007). However, the available studies may not adequately capture lesbian sexuality, which is less genital-centred.

5. CONCLUSION AND SUGGESTIONS FOR FUTURE RESEARCH

In this chapter, we provided an overview of key definitions and summarised the sociological studies on love (and emotions) and sexuality in committed relationships. We described the debates about whether love is a universal or a culturally specific phenomenon, explained the relevance of romantic love semantics, and discussed the recent transformation of the understanding of love. We also observed that the sexuality of couples has changed significantly, and that these changes in sexuality began before the start of the so-called 'sexual revolution'. In reconstructing these cultural changes, we showed how an era of liberated sexuality and established ethical sexual negotiation has shaped the sexual behaviour of couples. We recommend bringing the two largely independent research fields of emotion and sexuality closer together. In Western societies, love and sexuality are closely related, and are regarded as mutually causal. This correlation between emotionality and sexuality (McNulty et al. 2016) should be examined further in order to determine whether, as expected, there is bi-directionality. In general, sex research has to include emotional experiences, and emotions research should consider sexual interactions as the basis for emotions.

A wide range of lifestyles extending beyond heterosexuality and committed relationships are now receiving considerable attention in sex research, and without being subjected to assumptions about whether these behaviours are 'normal'. However, this understanding does not apply to family studies, which continue to focus on heterosexual, committed relationships (for an exception, see Maier 2007). This restricted focus limits our understanding of the multitude of existing life plans, and prevents us from learning more about heterosexual committed couples through comparisons with same-sex and non-monogamous relationships. United States research has made more progress in closing this gap than research in Europe (Diamond and Blair 2018).

In addition, because most sex research focuses on individuals in couple relationships, it tends to privilege individual sexual activities or individual emotional experiences. More attention should be paid to the social dimension of these behaviours, given that they are always happening in an exchange with another person in a committed relationship. Sociology, which claims the social as its subject matter, could make a significant contribution to this area. In particular, script theory shows that couples build their interpersonal scripts for their own sexuality based on their previously acquired intrapersonal scripts, and in line with cultural norms. Emotions are not simply the internal processes of a single entity; rather, emotions are produced by the dynamics within the relationship, and they are continuously interpreted and managed in social exchanges.

A notable deficit of current emotions research is that it mainly provides snapshots. Little is known about whether and, if so, how emotions change over time in a personal relationship. How are emotions embedded in the relationship history of a couple or in the relationship biographies of individuals? While some authors delineate a period of falling in love, they do not examine the changes in love relationships over time (Riela et al. 2010). Following Simmel, we might ask whether love is sustainable over the long term, or whether it needs to be supported by a secondary emotion, such as fidelity (Seebach 2017). In addition, we do not yet know whether and, if so, how love ideals differ in successive relationships. Such issues are relevant not just for the study of emotions, but for efforts to understand sexuality.

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PART VII

NEW INSIGHTS INTO THE DIVISION OF WORK IN FAMILIES

20. Gender and labour market outcomes

Anna Matysiak and Ewa Cukrowska-Torzewska

1. PAST TRENDS AND CROSS-COUNTRY DIFFERENCES

1.1 Gender Gap in Employment and Working Hours

All over Europe women are less likely to be employed than men. In 2018, 63.3 per cent of working age women in the European Union (EU) (EU-27 and United Kingdom (UK)) were in employment, which was 10.5 percentage points lower than for men (Eurostat 2020a). This difference was smallest in the Nordic countries, which since the 1970s have consistently been pursuing high women's employment, as well as Latvia and Lithuania (less than 5.6 percentage points). On the contrary, women were far less likely to be employed than men in Southern European countries (except for Portugal) and some of the post-socialist countries (Czech Republic, Hungary, Poland, Romania, and Slovakia). In most of the countries apart from the Czech Republic and Slovakia, the gender gap in employment is particularly large among the low or medium educated (Eurostat 2019a).

Historically, the gender gap in employment has been much wider. It slightly exceeded 30 percentage points in the early 1980s and has been gradually narrowing since then (OECD 2019a, own calculations). This decline was particularly pronounced during the Great Recession, especially in countries where the economic situation deteriorated most strongly. This phenomenon was largely driven by a more severe destruction of jobs usually performed by men, i.e., in manufacturing and construction, than the typically female jobs in the service sector and by the increased effort of women to enter the labour market in response to a growing risk of income loss among their partners (Bettio et al. 2013). The downward trend in the size of the gender gap in employment has, however, stalled in the aftermath of the crisis and in some countries the disparities even started to grow again (e.g., in Spain or Ireland) (OECD 2017).

Women appear to be even less active in the labour market than men, if we consider that they work shorter hours. In 2018, women in the EU worked 34 hours per week on average, i.e., six hours less than men (Eurostat 2020b). This difference was particularly large in Austria, Germany, Ireland, the Netherlands, Switzerland and the UK, i.e., countries where part-time employment among women is most widespread. Part-time employment, however, is not a viable option in all countries. The opportunities to work part-time in Southern Europe and post-socialist countries of Central and Eastern Europe (CEE) are much more limited. Mothers in CEE are also reluctant to work part-time as it means lower earnings, which makes market work less attractive (Hobson et al. 2011; Kanjuo-Mrčela and Cernigoj Sadar 2011).

In contrast to women, men tend to work long hours (Adler and Lenz 2016; OECD 2017). The expectation for men to remain highly committed to work is still widespread in Europe, making it difficult for them to reduce work hours or make use of flexible work arrangements (Baranowska-Rataj and Matysiak forthcoming). Men work particularly long hours in countries where the regulations toward working time are either weak or weakly enforced (Mutari and Figart 2001). It is notable, however, that the Great Recession brought some reduction in men's

working time, largely involuntary, and led to an increase in the part-time employment among men (Bettio et al. 2013).

1.2 Gender-based Horizontal Segregation in Employment

Women are not only less often present in employment than men, they also tend to cluster in certain sectors and occupations; a phenomenon termed as a gender-based horizontal segregation. In the EU, women predominate in services, mainly in sales and retail trade, health and social work, while men predominate in manufacturing and construction. Related to that, women and men also cluster in certain occupations. Women are more likely to work in clerical jobs, in services and sales and as professionals, while men are more likely to work as plant and machine operators, assemblers and craft and trade workers.

A common measure of the gender segregation in occupations is the ‘Duncan and Duncan index of dissimilarity’ (Duncan and Duncan 1955). It indicates what percentage of male/female workers would have to change their jobs so that the proportion of men and women within occupations becomes equal. In the EU, this proportion was relatively stable over the last two decades and amounted to around 50 per cent¹ (Bettio and Verashchagina 2009; OECD 2017). There is, however, a huge cross-country variety of trends and levels behind this value. Historically, the gender occupational segregation was strongest in Nordic countries and lowest in Southern Europe, largely because an increase in female employment in the social-democratic welfare states went hand in hand with expansion of public services, which replaced the activities typically performed by women at home (Bettio 2002). With time, however, Nordic as well as some of the Western European countries and the United States (US) started to experience a desegregation. This process has been rather slow and is largely caused by a gradual increase in women’s employment in typically male-dominated and neutral occupations rather than changes in the occupational structure of the economy (Bettio and Verashchagina 2009; Blau et al. 2013). At the same time, occupational segregation has been growing in Southern Europe and some of the post-socialist countries (Bettio and Verashchagina 2009), with the latter region currently displaying the highest segregation level in Europe (OECD 2017).

1.3 Women and Men in Management

Women are also underrepresented in managerial and supervisory positions; a phenomenon termed as vertical segregation. In 2018, the proportion of women among managers in the EU amounted to 34 per cent, though it varied across countries from above 40 per cent in Latvia, Poland, and Iceland to merely 17 per cent in Cyprus (Eurostat 2019b, own calculations). The representation of women in management has been increasing over time in almost all EU countries; yet the improvement was modest and amounted only to four percentage points over nearly 20 years (Eurostat 2019b, own calculations). Women are particularly unlikely to be present at the chief executive level: in 2018 the proportion of female chief executive officers in publicly listed companies amounted to 6.3 per cent in the EU and 4.8 per cent in the US (ILO 2019). The low presence of women among managers has motivated some governments to implement strict gender quotas with penalties for non-compliance (Belgium, Italy, France, Norway, Spain) or milder country corporate governance codes which require reporting on recruitment efforts to achieve gender diversity (Austria, Denmark, Germany, Ireland, Netherlands, Poland) (Terjesen et al. 2015).

Greater representation of women in top positions has been claimed to have a positive influence on firm performance. Nonetheless, empirical evidence on this relationship is rather mixed (Post and Byron 2015) and the association is mostly seen in countries and sectors with a higher proportion of women in the labour force, i.e., where women's knowledge, experience, and skills are better appreciated (Christiansen et al. 2016). There is firmer evidence that a higher proportion of women among directors has the potential to eradicate barriers to women's professional careers at lower levels. Greater presence of women in top management tends to co-exist with narrower gender gaps in promotion (Kunze and Miller 2017) and earnings (Cohen and Huffman 2007; Hultin and Szulkin 2003), though some studies yielded insignificant findings (Bertrand et al. 2019). Others showed that the relationship also depends on the sector (Magda and Cukrowska-Torzewska 2019), on whether the share of female directors is large enough to reach a 'critical mass' (Schwartz-Ziv 2017), and whether female managers are present among direct supervisors or at the top executive level (Cohen and Huffman 2007; Hultin and Szulkin 2003).

1.4 Gender and Earnings

The increase in women's labour market participation, employment, and working hours over the last decades has been accompanied by a rise in women's earnings and their gradual convergence towards the earnings of men. Yet, despite the closing of the gender pay gap, women continue to earn less, and the gap persists in numerous economies worldwide. The Organisation for Economic Co-operation and Development (OECD) data show that over the last four decades the gender pay gap, defined as the difference between the median earnings of men and women relative to the median earnings of men, decreased by around 20 per cent in Australia and Sweden, 30 per cent in Finland, 40 per cent in Japan, and to as much as 50–60 per cent in the US and the UK (OECD 2019b). The speed of convergence was larger in countries with higher initial earning inequality (Kunze 2018) and was strongly related to the increase in women's education (OECD 2017; Weichselbaumer and Winter-Ebmer 2005).

The size of the gender wage gap varies in many dimensions, including workers' education level, age, type of job performed, and position (Goldin 2014). Greater gaps are reported among better educated workers (OECD 2017) and at the top of the wage distribution (Arulampalam et al. 2007). The disparities between men's and women's earnings also tend to widen over the life cycle (Goldin 2014). They are generally smaller within jobs or at the firm level than at the country level, which reflects that part of the gender wage gap is due to the sorting of men to firms that pay on average more (Korkeamäki and Kyrrä 2006). However, the pay gap still exists within jobs, which as Goldin (2014) argues is largely due to the nonlinear relationship between earnings and work hours, and particularly disproportional rewards for long hours, typical of corporate, financial, and legal jobs.

2. SOURCES OF GENDER INEQUALITIES IN THE LABOUR MARKET

2.1 Education

Education is a key determinant of labour market performance. In the mid-1980s men still dominated among university students in most of the OECD countries (Vincent-Lancrin 2008), which could partly explain the gender difference in labour market outcomes. The situation has, however, changed dramatically since then. By the end of the previous decade, there were more women than men among university students across the OECD except for Switzerland (De Hauw et al. 2017). In 2018, the proportion of women with tertiary education among 25–34 year olds in OECD countries reached 50 per cent whereas among men it was 38 per cent (OECD 2019c). Consequently, the gender gap in educational attainment can no longer explain the worse labour market outcomes of women.

Yet, what still remains largely unchanged are gender differences in the field of education (Barone 2011). Women to a higher extent than men choose to study arts and humanities, education, and health and welfare rather than science, technology, engineering and mathematics (STEM). In 2014, for instance, across the OECD countries women accounted for only 24 per cent of entrants into engineering, manufacturing, and construction and only 20 per cent into computer science programmes (OECD 2017).

There is firm evidence that the field of education is more important for explaining women's disadvantaged position in the labour market than educational attainment. According to Francesconi and Parey (2018), the field of study explains more than half of the gender gap in pay among university graduates in Germany; for the US, Brown and Corcoran (1997) found that the respective number is around one-quarter to one-half. Socialisation at the parental home appears to be the main reason for girls choosing arts and humanities rather than mathematics (Støren and Arnesen 2007), though the differences may also be driven by comparative advantages of either gender in a particular field of study (Jonsson 1999). In response to the latter argument, Fryer and Levitt (2010) found that there is no gender difference in math performance upon entry to school, but it evolves with time. The authors concluded that socialisation received at school may thus be critical for lower enrolment of girls into STEM. Women's lack of belief about succeeding in STEM along with certain characteristics of STEM jobs (e.g., long working hours outside the normal work schedule) that impact the work-family balance have been also claimed to stand behind the gender difference in the fields of study (European Commission 2018).

2.2 Parenthood and Child-Related Career Breaks

As in the case of field of study, childrearing obligations are one of the major reasons for women's poorer performance in the labour market. Across the developed countries, mothers allocate substantially more time to childcare than fathers, especially in the first few years after birth. This, in turn, has important consequences for women's careers. There is wide evidence that mothers are less often employed than childless women (Pettit and Hook 2005), have poorer promotion prospects (Correll et al. 2007; Heilman and Okimoto 2008), and tend to receive lower wages (Budig et al. 2012; Cukrowska-Torzewska and Matysiak 2020).

There are numerous mechanisms through which having children affects women's work careers. First, career breaks and reduced working hours lead to deterioration of human capital. Some employers may also avoid promoting women who took a long parental leave as they may perceive them as unattached to work. Evertsson and Duvander (2011) found that mothers who stayed on leave for 16 months or more were less likely to experience an upward occupational mobility, and Puhani and Sonderhof (2011) reported that longer parental leave is negatively associated with women's chances to participate in employer-arranged training. Related to that, Evertsson (2016) found that leave taking after childbirth leads to women's lower wages and this penalty increases with leave duration and women's education. The penalty for taking parental leave was also found to be higher in male-dominated sectors which reward long working hours (Bertrand et al. 2010). Second, mothers display worse labour market outcomes because they choose jobs which are better compatible with childcare, but pay lower wages and offer fewer promotion prospects. While single studies do not ultimately point to this explanation, two meta-studies provide it with some legitimacy (Weichselbaumer and Winter-Ebmer 2005; Cukrowska-Torzewska and Matysiak 2020). Finally, having children may also affect mothers' productivity and thereby affect their labour market outcomes. In line with this hypothesis, Yu and Kuo (2017) found that wage gaps are particularly high in jobs, which require substantial time and energy investments; a condition which cannot be easily met by mothers who already face high work demands at home. An opposite conclusion was drawn by Kmec (2011) who found that mothers do not report lower work effort than childless women and men.

While childless women usually outperform women with children in the labour market, fathers earn higher wages and occupy higher positions than childless men. This phenomenon, called 'fatherhood premium', is attributed to a selection of highly successful men into parenthood, increased work effort of new fathers who may feel obliged to provide income to a larger family, and discriminatory practices of employers who perceive fathers as highly reliable and committed employees (Hodges and Budig 2010). So far, it is not clear which of these mechanisms is responsible for the fatherhood premium. Some studies showed that neither selection of highly successful men into parenthood nor higher work effort fully explain fatherhood premium (Baranowska-Rataj and Matysiak forthcoming; Hodges and Budig 2010) even though some men indeed tend to work longer hours after becoming fathers (Kaufman and Uhlenberg 2000). Finally, a corresponding study by Correll et al. (2007) revealed discriminatory practices against childless men by showing that fathers with identical job attributes are more often recommended for hiring and promotion and offered higher salaries. This finding was not confirmed by other studies of this type, however (e.g., Fernandez-Lozano et al. 2019; Heilman and Okimoto 2008).

Last but not least, it has been argued that differences in fathers' and mothers' labour market position will narrow as men increase their involvement in domestic work and childcare (Goldscheider et al. 2015). Research demonstrated that mothers are more likely to be employed full-time if their male partners are more involved in housework (Fanelli and Profeta 2019) or make use of flexible work arrangements (Langner 2018). At the same time, studies from the US showed that mothers are more likely to earn lower wages and opt out from the labour market if their husbands overwork (Cha 2010). An increase in men's involvement in the family does not only affect mothers' but also fathers' work careers. Studies showed that fathers experience wage penalties for taking parental leave or using flexible work arrange-

ments and that these penalties can be even higher than among mothers (Evertsson 2016; Rudman and Mescher 2013).

2.3 Noncognitive Skills

Recently, social scientists have turned to searching for explanations for the persistence of gender gaps in labour market outcomes in the differences in noncognitive skills among women and men. Studies consistently report that women are more risk averse than men and are less willing to compete, especially with men (see literature reviews by Croson and Gneezy 2009 and Niederle 2016). Women are also, on average, more neurotic, agreeable, and conscientious (South et al. 2018), are better at recognising colours and hearing faint sounds, and have a better sense of touch, smell, and taste, but are more sensitive to noises and perform worse on spatial tasks (Cobb-Clark 2016).

Empirical evidence on the role of noncognitive skills for gender differences in labour market outcomes is to date rather scarce. The review by Bertrand (2011) suggests that women are more likely to commit errors in highly competitive environments (Ors et al. 2013) and are less likely to negotiate their starting salaries (Greig 2008). It is not fully clear, however, whether these findings are purely driven by biological factors or socialisation patterns (Bertrand 2011). Furthermore, studies find that noncognitive skills mostly influence occupational choices (Baker and Cornelson 2018; Cobb-Clark and Tan 2011), but their role for men's and women's wages is less clear (Blau and Kahn 2017). As argued by Cobb-Clark (2016), risk aversion or extroversion may be a disadvantage in some jobs, but an asset in others. Cobb-Clark and Tan (2011) showed that the gender wage gap continues to persist after accounting for gender differences in personality traits and locus of control, and Baker and Cornelson (2018) even report an increase in the gender wage gap after accounting for selection into occupations on the basis of sensory or motor abilities.

2.4 Gender Discrimination

Gender differences in labour market outcomes may also arise in the event of discrimination. Empirical research on this topic relies either on decomposition methods or experiments. Decomposition methods aim at assessing how much of the gender gaps can be assigned to observable differences between women and men and what portion remains unexplained and thus can be attributed to unmeasured factors such as discrimination (Blau and Kahn 2017). This approach may, however, overestimate or underestimate actual discrimination if women or men have some unmeasured skills which make them more productive. For this reason, in recent years more attention has been devoted to experimental research (for an overview see Bertrand and Duflo 2017). Neumark et al. (1996) were amongst the first to use a correspondence study to uncover discrimination in hiring practices in the US. They found that women are by 35 percentage points less likely to be invited to an interview and by 40 percentage points less likely to receive a job offer in high-price restaurants than men with similar job attributes. Similarly, Goldin and Rouse (2000) showed that the hiring rate of women in American orchestras has substantially increased after adopting 'blind' auditions, in which musicians perform behind the screen to conceal their gender. Studies from Australia and Sweden have, however, reported no traces of discrimination in hiring (Booth and Leigh 2010; Carlsson 2011).

Research also investigated gender discrimination in pay. For instance, Moss-Racusin et al. (2012) showed that science faculty perceive male applicants as more competent and recommend them for a higher starting salary than female applicants. Correll et al. (2007) also reported discrimination, but based on parenthood status. The study showed that American mothers were recommended lower starting salary and were less likely to be promoted or recommended for management than non-mothers with the same characteristics. No similar pattern was, however, found in Spain (Fernandez-Lozano et al. 2019), which suggests that the degree of gender discrimination varies by institutional setting as well as occupations and industries.

3. POLICIES

Gender differences in labour market outcomes vary substantially across countries and this diversity is usually attributed to the variation in family and labour market policies. Highly accessible public childcare with long opening hours is probably one of the most efficient instruments supporting mothers' participation in the labour market (De Henau et al. 2011; Pettit and Hook 2005) and their relative pay (Budig et al. 2012, 2016). Not much is known, however, on whether an increase in the childcare quality would encourage an earlier labour market (re-)entry of new mothers.

When it comes to leave policies, empirical evidence suggests a non-linear relationship between leave duration and women's employment (Pettit and Hook 2005), earnings (Budig et al. 2012, 2016), or promotion (Evertsson and Duvander 2011). This evidence is largely consistent with theoretical predictions which presuppose that short leave should have a positive influence on mothers' employment as it allows for taking time off from work without terminating work contract and for arranging proper childcare before employment (re-)entry. Longer leave, in turn, may lead to depreciation of human capital. There is no consensus, however, on the optimal duration of the leave for women's employment prospects, which ranges from six months (Baker and Milligan 2008) to even two years (Budig et al. 2012, 2016). This variety of findings may be due to the fact that consequences of leave use may depend on childcare availability, labour market structures, or woman's job characteristics.

Increasingly, parental leave policies are directed not only at mothers but also at fathers – through adoption of quotas and nontransferable individualised leave rights. In 2017, Swedish fathers, for instance, accounted for 45 per cent of parental leave recipients and made use of 29 per cent of total leave days taken (as compared with 14 per cent in 2000) (OECD Family Database). So far, there has been little research on employment consequences of the extension of parental leave rights to fathers. Existing research shows that fathers who made use of leave experienced substantial wage penalties (Evertsson 2016; Rege and Solli 2013). At the same time, Budig et al. (2016) demonstrated that gender wage gaps are smaller in countries which introduced incentives for fathers to make use of parental leaves.

In addition, employment policies may also affect men and women's labour market outcomes. The right to switch from full-time to part-time work helps women to continue working after entering motherhood, though it seems to be most helpful to low- and medium-educated women (Goldin 2014; Hegewisch and Gornick 2011). Flexible working hours and the possibility to work from home may also help to combine work and care (Kelly et al. 2014), although they may also lead to longer working hours and increase work–family conflict (Schieman et al.

2009). Recently, more attention has also paid to working time regulations, which could help curtail overtime among men (Adler and Lenz 2016).

Finally, some studies looked at the role of whole policy packages with the idea that policies are more effective when they ‘come in a bunch’. Consistent with this idea, studies showed that women living in countries where policies support mothers’ employment are more likely to be employed, work longer hours, and are less likely to experience wage penalties (Baranowska-Rataj and Matysiak 2016; Cukrowska-Torzewska and Matysiak 2020). There is also evidence that policies interact with each other in creating conditions which are particularly supportive of mothers’ labour market outcomes (Cukrowska-Torzewska 2017) and that they are more efficient in countries with higher acceptance of mothers’ paid work (Budig et al. 2012).

4. CONCLUSION AND SUGGESTIONS FOR FURTHER RESEARCH

A substantial body of empirical research has been conducted in order to evaluate and explain gender differences in the labour market. The labour markets are dynamic, however, and they continuously pose new challenges to their participants and thus generate new research questions. One of these challenges is the rapid technological change (e.g., development of robots and information and communication technologies), which alters the ways people work and modifies the labour demand. The question of how technological advancement will change the relative position of female versus male workers remains unanswered and research on the topic is only beginning (e.g., Brussevich et al. 2019; Cook et al. 2018). Similarly, the ongoing population ageing, the inevitable switch to green energy and the Covid-19 pandemic will transform the conditions of participating in the labour market and also affect its gender dimension.

Furthermore, many of the questions on the relative position of women and men in the labour market that have already been posed continue to be unanswered. For example, we still do not know why women tend to choose certain fields of study (humanities, education, health and welfare) instead of maths, informatics, or engineering and why working in education or health-care, which are both of high social importance, continues to be less valued in financial terms than working in typically male professions. Similarly, while research has shown that gender differences in noncognitive skills are partly responsible for the persistence of occupational segregation, it remains unclear whether and how these differences contribute to the emergence of vertical segregation and gender pay gaps. Women’s underrepresentation at the executive level and its role for women’s relative pay is another area that remains understudied.

More research is also needed on the role of the social context for shaping men’s and women’s labour market outcomes. So far, most of the researchers’ attention has been paid to family policies and far less has been done on other aspects of the social context, including employment policies (e.g., flexible working hours, telework, working time regulations, antidiscriminatory laws), labour market structures (e.g., industry, sector, occupation, union density, wage distributions) and social norms about men’s and women’s roles. Equally important and poorly addressed are firm-level factors (e.g., company policies, norms, practices), peculiarities of certain jobs and occupations and family- and household-level factors (e.g., partners’ involvement in the labour market and the family).

Finally, progress is needed in terms of the methods and approaches used. First, research could provide us with more information on the changes in men and women's situations in the labour market even such research uses simple aggregate measures but applies a cohort approach. In that respect, sociologists and economists working in the field could learn from demographers who have long realised that aggregate measures may lead to distorted conclusions if successive cohorts shift the timing of events across the life course. More knowledge could also be gained from research focusing on individuals. Even though the shift from a cross-sectional to a longitudinal approach has already taken in individual-level research in the field, there is still room for investigating how the accumulation of various family-related events (such as union formation and dissolution, childbearing, or family migration) influence partners' work careers (taking the couple dynamics into account), and how they translate into gender differences in labour market later in life. Last but not least, more research employing experimental and quasi-experimental techniques could help us unravel causal relationships between the possible determinants and men and women's labour market outcomes, including employers' practices, policies, laws, structures, and social norms.

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NOTE

1. There is some dispute about the accuracy of this indicator. It is very sensitive to the level of detail of the data on occupations, i.e., whether data with two-, three-, or four-digit occupational coding are used.

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21. The gender division of housework and child care

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1. INTRODUCTION

Why is the division of housework and child care important to the sociology of the family? This question cannot be addressed without first distinguishing between housework and child care, which in much of the early history of research into the division of labour were often lumped together into the undifferentiated category of ‘unpaid work’.¹ On the one hand, research on housework has yielded important insights into couple gender relations and, in particular, into the ways in which heterosexual couples negotiate, bargain over, and argue about the division of an undesirable activity (housework) in a situation of unequal gender power. On the other hand, the study of the parental division of child care has contributed to our understanding of changes over time in parental input into the daily lives of their children, the ways in which mothers and fathers divide up different child-care activities, and the impact of the time parents spend with their children on child outcomes.

The gender division of housework and child care is one of the most critical determinants of both the work–life balance and the life chances of women and men in couples (see also Grunow in this volume). While the gender pay gap has recently received considerable media attention, the focus on paid work can obscure the contributions of housework and care to this gap. In a context in which both women and men are expected to participate in the labour market, the overall gender division of labour (both paid and unpaid) within couples determines to a large extent what the outcomes of this participation will be. The traditional and ongoing expectation that women will be responsible for the burden of domestic labour and care can make it more difficult for women to acquire employment skills and experience, which can, in turn, result in a pension gap that mirrors the gender pay gap, and that continues to have an impact on women’s quality of life and life chances into older ages.

This is the wider context in which the theoretical discussions of how couples negotiate the division of household chores and care take place. These discussions have been predominantly, although not exclusively, framed by a hetero-normative vision of ‘coupledom’; i.e., based on the implicit assumption of a heterosexual couple living with their children (see also Evertsson et al. in this volume). In this chapter I aim to show patterns of convergence in the gender division of housework and child care, while seeking to understand the processes involved in these long-term, cross-generational trends.

2. THEORETICAL PERSPECTIVES

The underlying assumption of traditional economic models of the division of labour is that men and women in couples divide their paid and unpaid work rationally, according to their respective earned income potential (e.g., Becker 1981). To paraphrase, these models posit that in a gender-unequal marketplace, men earn more than women on average, primarily because

of women's childbearing and childrearing responsibilities, and this 'economic rationality' explains the unequal gender division of labour. Economic bargaining theory extended these models by introducing a bargaining element into the equation. Proponents of this perspective argued that women and men in couples negotiate and bargain over who gets to do the least desirable tasks, based on the assumption that housework is among the least desirable of all activities (Lundberg and Pollack 1996; Sorensen and McLanahan 1987 – this assumption has been confirmed by the results of surveys in which respondents are asked to rate their enjoyment of daily activities; Gershuny 2019). As this bargaining takes place in a context of unequal power between women and men, the less economically powerful partner (i.e., the woman) usually ends up doing more unpaid work.

The assumption of an economically rational division of labour, even when mediated by economic bargaining under conditions of unequal power between women and men, has, however, been criticised by feminist researchers (e.g., Berk 1985; Hochschild and Machung 1989). It has, for example, been pointed out that those who do the bulk of housework and child care (i.e., women) – in particular, those who spend time out of the labour force while on maternity leave or who engage in part-time employment – have fewer chances to develop their employment skills and experience, which can negatively affect their career/employment trajectories, and, hence, their potential earnings (see Sullivan et al. 2018). Therefore, doing unpaid household work is as much a *cause* of economic inequality as it is an effect. In light of continuing cross-time and cross-national gender inequality in the performance of housework and care, an alternative theoretical perspective, *the gender perspective*, has gained substantial traction. According to this perspective, gender itself – as constituted both ideologically and in practice ('doing gender'; West and Zimmerman 1987) – is an important determinant of who does what type of paid and unpaid work, including care tasks. The gender perspective is supported by the consistent research finding that even in couples in which the woman earns the same or more than her male partner, the woman continues to do more housework and child care than her male partner.

3. LANDMARK RESEARCH FINDINGS

3.1 The Sociology of Housework: Economic Bargaining versus Gender

The idea of housework as a topic of sociological enquiry has its roots in the second wave of feminism in the 1970s. Because housework is generally perceived negatively, which partner does the housework has long been regarded in the sociological literature as an important indicator of marital power; a research tradition dating back to the work of Blood and Wolfe (1960). The research of Oakley (1974) in the United Kingdom (UK), and of Berk (1985) and Hochschild and Machung (1989) in the United States (US), highlighted the boring, repetitive, and isolated nature of housework, and provided important gender-based explanations for why housework became a feminised task.

The early findings of quantitative empirical research (e.g., Brines 1994; Greenstein 2000) broadly supported the arguments of economic bargaining theory by showing that there was a negative linear dependence between relative spousal earned income and the amount of housework done. However, highly influential evidence was also found for a *gender deviance neutralisation* effect – a term coined by Bittman et al. (2003). Brines argued that while the

housework hours of wives and husbands largely confirmed the assumptions of conventional economic bargaining theory, husbands who were economically dependent (particularly those in low-income households and the long-term jobless) did less housework than others. These analyses lent strong support to gender theory by seeming to demonstrate that in certain structural situations, the power of gender could override the power of money.

Indeed, qualitative research conducted in Britain and the US during the 1980s had already begun to document behaviours among men in certain economic situations that resonated with the idea of gender deviance neutralisation. British studies showed that working-class men who had lost their economic power in the household by losing their paid employment tended to emphasise their gender-normative role by not contributing to the housework, regardless of the employment status of their female partner (Morris 1985). In the US, Hochschild and Machung (1989) reported similar findings; among couples where the husband earned less than his wife, none of those husbands shared the housework, while among those couples where the husband earned the same as or more than his wife, between a fifth to a third of husbands shared the housework.

A complementary hypothesis of gender deviance neutralisation among breadwinner wives emerged from the findings of Greenstein (2000), but subsequent studies have not produced a unanimous verdict on the importance of gender deviance neutralisation vis-à-vis economic bargaining. Killewald and Gough (2010), for example, found no relationship between spousal relative earnings and women's housework hours; while Gupta (2007) and Gupta and Ash (2008) concluded that women's absolute, rather than their relative earnings determined their housework hours; dubbing this the *women's autonomy* model. The combination of the importance of women's absolute earnings and their non-linear relationship with housework hours across the distribution of those earnings may account for the continuing evidence of gender deviance neutralisation reported in the literature (Killewald and Gough 2010).

In mixed-methods research, the autonomy model found some support in interviews with UK professional/managerial women who earned more than their male partner. These interviews revealed that, although the majority described themselves as more likely to take *responsibility* for housework, they reported a significantly less traditional division of domestic labour than other women, and did not report that this responsibility was part of any effort to neutralise gender deviance. Indeed, it appeared that these women were simultaneously *undoing* gender (Deutsch 2007; Risman 1998) and doing gender. In situations where they believed that the division of labour was unfair, they contested their male partners' performance of housework (Benjamin and Sullivan 1999; Lyonette and Crompton 2015).

To summarise, there is evidence that economic bargaining plays a significant role in couples' decisions about the division of housework, but that this effect is at least mediated by gender. It is also clear that the processes of negotiation and bargaining are more nuanced, and involve wider considerations with respect to resources and power within couples, than traditional economic bargaining theory assumes. Overall, at all levels of couple resources, women, on average, do more housework and care tasks than men – albeit with the caveat that the division of housework tends to be more equal in couples in which the woman earns more than her male partner (Sullivan and Gershuny 2016). Indeed, some influential qualitative research has focused explicitly on couples in which the division of housework and care was equal. This research showed that, both in the US and internationally, the factors that are associated with equal sharing include couples' gender ideologies (equality-friendly attitudes and willingness to defy normative assumptions of gender), as well as influences from the partners' families of

origin, and the extent to which workplaces are structured to promote equality (Deutsch 1999; Deutsch and Gaunt 2020).

3.2 Caring for Children; Not Unpaid ‘Work’!

The finding that caring for children is, in general, rated as much more enjoyable than doing housework implies that the motivations and processes involved when couples are negotiating child-care responsibilities differ from those involved when they are negotiating housework (Sullivan 2013). While housework is regarded as an undesirable activity, caring – and, in particular, caring for children – falls into a different category of experiences that are perceived as being, at least in some aspects, enjoyable and rewarding. This distinction is also necessary because it is gendered: research has shown that women tend to do more of the less enjoyable tasks within the general category of child care (e.g., changing nappies and preparing routine meals), while their male partners are more likely to be involved in more interactive or fun activities with children (e.g., Bianchi et al. 2006; Roeters et al. 2009).

There is ample evidence that the amount of time parents devote to child care has been increasing, and these findings are discussed in greater detail in the following section. This trend has been attributed to changes in the meaning and nature of child care, with a growing emphasis, in particular among the more highly educated middle classes, on more caring fathering practices and father participation in child-related activities (Gracia and Ghysels 2017; Kalil et al. 2012; Sayer et al. 2004). Bianchi et al. (2006) suggested that parents seek ways to maximise the time they spend with their children by including children in their own leisure time. The increase in recreative child care is particularly relevant to highly educated parents who may seek to expose children to activities and programmes designed to prepare them for college or career opportunities (Ramey and Ramey 2010). By investing more in such behaviours, highly educated parents promote processes of capital formation among their children, thereby reinforcing existing differentials in human and cultural capital (Lareau 2011).

It is also clear that the process of becoming a parent is a key gendered landmark in the longitudinal process of decision making with regard to the division of domestic labour and care (e.g., Dribe and Stanfors 2009). The birth of a first child often leads to a marked shift in domestic responsibilities, even among couples whose ideological orientation is gender-equal. This process and its effects have been documented across Europe in a recent longitudinal qualitative study of mainly middle-class, dual-earner couples before and after the birth of their first child (Grunow and Evertsson 2016, 2019). The study found that a ‘significant share’ of the parents who had planned to divide responsibilities equally after the birth ended up with a more traditional division of housework and care, largely due to the combined influence of the social policy context and the normative gender culture in which they were living (Grunow and Evertsson 2016, 2019).

4. CROSS-SECTIONAL DIFFERENCES IN AN INTERNATIONAL CONTEXT

Reviews published across successive decades have summarised research on individual and couple differences in the time women and men spend on housework and child care (Bianchi et al. 2012; Coltrane 2000 for the 1990s; Lachance-Grzela and Bouchard 2010 for the 2000s).

In addition to the focus on individual and relative spousal income elucidated in the theoretical perspectives outlined above, educational level has been consistently found identified as among the most significant influences on the division of labour (*ibid.*). Moreover, for the reasons referred to in the section above, the relationships found between education and housework and education and child care differ. In general, the higher a woman's level of education, the less housework she does, while the opposite relationship is observed among men. In contrast, a strong positive relationship between child care and educational level has been reported for both men and women.

Because the overwhelming focus of the early literature on this topic was on white, heterosexual couples, differences in relation to race and sexuality have been far less studied, although the body of research on how the performance of various household and care tasks differs by race/ethnicity and sexuality has been growing (Evertsson et al. in this volume). Findings have been varied, but it is clear that in the area of race/ethnicity, some black and ethnic minority fathers and men do more child-care tasks and housework than their white counterparts (e.g., Cabrera et al. 2011 for the US; Kan and Laurie 2016 for the UK). Research on same-sex couples also presents an interesting challenge for existing theoretical models, which are based on a normative model of heterosexual spouses that plugs into the wider framework of gender inequality. There is no reason to directly transpose this model onto same-sex couples, and, indeed, there is evidence that same-sex couples share child care and housework more equally than heterosexual couples (Evertsson et al. in this volume; Goldberg 2013; Kurdek 2007).

National social policies relating to women's employment, parental leave, and early child-care provision have also been shown to constrain or facilitate the promotion of gender equality in unpaid work and care in various ways (e.g., Craig and Mullan 2010; Cooke and Baxter 2010; Davis and Greenstein 2013; Fuwa and Cohen 2007; Hook 2010; Knudsen and Waerness 2007; van der Lippe and van Dijk 2001). The development of multi-level statistical models has made it possible to distinguish between the contributions of individual-level and context (country or welfare regime)-level variables. Overall, this body of research clearly supports the argument that the institutional settings that govern welfare policies and provisions strongly influence the individual-level factors that determine the gender division of housework and care (Treas and Drobnic 2010). For example, in relation to housework, such analyses have found that women do less housework and men do more housework in countries that have (a) higher levels of full-time employment among women, (b) greater provision of publicly funded child care, (c) relatively short paid maternal leave periods, and (d) more egalitarian gender attitudes.

5. INTERNATIONAL TRENDS USING TIME USE DIARY DATA

In this section, I focus on cross-national changes in the time women and men spend on housework and child care based on time use diary data. For large-scale quantitative analyses of the organisation and the division of the activities of daily life, including housework and care, time use diary surveys are considered the 'gold standard' (Cornwell et al. 2019). As time use diaries ask respondents to record continuous sequences of their activities across the day, they provide the most reliable estimates of the time people spend on different activities. Direct questions about time in conventional questionnaire surveys – for example, 'How many hours did you spend in your job last week?' – are prone to error, because people are not used to making

these sorts of summations. On the other hand, people are relatively used to providing the sort of sequential narratives that diaries contain; and it turns out that most people can record quite detailed and accurate accounts of their days using this approach. These sequential narratives of large numbers of distinct activities can then be classified for the purposes of analysis into larger groups of activities (e.g., paid work, leisure, and unpaid work).

Many time use diary surveys also ask respondents to record where they were when they were engaged in specific activities, who they were with, and other aspects of their instantaneous experiences, such as the enjoyment or stress associated with a particular episode of time. Time use diaries are typically collected across one or (preferably) a few days a week, and are completed by individuals or (preferably) all members of households. As there are now more than 100 nationally representative diary studies of developed and less developed countries available for study, both cross-national and comparative analyses of historical time use trends are possible. The development of these cross-time and cross-national series of time use data since the 1960s has enabled researchers to conduct large-scale analyses of international trends in, among other things, the gender division of household labour and care. The most extensive comparative information we have on international trends in domestic work and care come from the Multinational Time Use Survey; an archive of time use survey data that have been harmonised to enable comparisons across time and countries (Gershuny and Fisher 2013).

Whether meaningful change has occurred in the gender division of domestic labour and care over the past half-century has been a contested question since research on this topic began. The idea that progress towards a convergence in the amount of time women and men spend doing housework and care has ‘stalled’ has become popular (e.g., Cotter et al. 2011; England 2010; for media commentary following this research see Cohen 2014 and Coontz(2013). Research using time use data has reported a widespread decline in the amount of time women are spending on housework; with some corresponding, albeit much smaller, increases in the amount of time men are spending on housework, and rather larger increases in the amount of time men are spending on child care, across the countries of North America, Europe, and Australia (Bianchi et al. 2006; Gauthier et al. 2004; Gershuny 2000; Sullivan et al. 2018). Analysing these trends using a multi-level model of housework time that nests individuals within country-years, and that controls for demographic and socio-economic variables, Altintas and Sullivan (2018) showed that although there has been a relatively steep decline over time in gender inequality in the time spent on housework in countries that are still relatively gender-unequal, this trend has attenuated over time in countries where the time men and women spend on housework has already become more equal (see also Geist and Cohen 2011 for an earlier version of this argument). This is likely to be the effect of, in the first instance, steep declines in the time women spend on housework associated with their increasing move into the primary labour force, followed by a slowing in the trend towards gender equality through men’s failure to ‘make up the gap’ by increasing the time they spend on housework. This apparent support for the idea that, in certain countries, progress towards gender convergence has ‘stalled’ illustrates the challenges involved in achieving the ‘second half’ of the gender revolution, as described in Goldscheider et al. (2015). In the first half of this revolution, women move into paid work, while in the second half, the division of labour becomes more equal, including in the sphere of unpaid work and care. Overall, these findings point to a long-term cross-national process of stuttering progress towards gender equality in which men’s contributions to housework are slowly increasing, while women’s are dramatically decreasing, and both mothers and fathers are increasing their child-care time.

6. FOCUS ON FATHERS: A KEY COMPONENT OF CHANGE?

We know that the time men spend on housework has been increasing only rather slowly over recent decades, while their contributions to child care have been increasing more rapidly. If we want to understand and promote progressive change towards gender equality, this latter trend provides us with an opportunity to identify the factors that underlie it, which could, in turn, provide us with a push towards achieving the ‘second half’ of the gender revolution. Child care performed by fathers has, therefore, become an important focus of both academic research and popular interest. As I noted in the section above, there has been a clear, across-the-board increase in the amount of time fathers spend on care in the industrialised countries for which we have time use data series. However, these overall trends conceal significant heterogeneity at both the individual level, according to men’s educational attainment; and the institutional level, according to social policy regime type.

In relation to the educational attainment of men, it has been argued that the increases we observe in the care provided by fathers are in line with a growing emphasis on caring fathering practices. Higher educational attainment is associated not only with more egalitarian gender ideologies, but also with greater investment in ‘developmental’ activities for children (which may have the effect of reinforcing existing differentials in human and cultural capital, as more highly educated parents are able to promote processes of capital formation among their children: Altintas 2016; Lareau 2011; Ramey and Ramey 2010). A study comparing married/cohabiting fathers of young children in the gender-traditional countries of Southern Europe with their counterparts in other developed countries found that, overall, being college-educated has a stronger positive effect *over time* on fathers’ contributions, and that this relationship proved to be the strongest in the more gender-traditional countries (Sullivan et al. 2014). This evidence of a ‘catch-up’ effect among educated fathers in countries where the division of labour between women and men has been most traditional lends support to the idea that there has been a ‘social diffusion’ effect that has led to the spread of ideologies that promote the egalitarian division of domestic labour and care (Esping-Andersen and Billari 2015). This observation also resonates with the findings of Altintas and Sullivan (2016).

Altintas and Sullivan (2016) added an institutional-level dimension to these trends by focusing on fathers of children under age five living in different clusters of countries defined by their social policy contexts (see Esping-Andersen 2009). While the time spent on child care by these fathers increased significantly in all policy clusters over the 40-year study period, the gap between fathers in the Nordic and in the Corporatist (continental European) policy clusters widened over the period, with the Nordic fathers moving ahead. On the other hand, fathers from the Liberal (Anglophone) policy cluster showed the most rapid increase, and had almost caught up with the Nordic fathers by the end of the period. The trends in the time spent on core housework varied, with only minor increases being observed among fathers from both the Liberal and the Corporatist policy clusters. Particularly striking was, however, the ‘catch-up’ effect found among fathers from the Southern (Mediterranean) cluster of countries, such that the gap in the time spent on housework between these fathers and those from the Liberal and Corporatist clusters had practically closed by the end of the 40-year period. To summarise, the time fathers spent on child care increased substantially in all countries, but the gap between the Nordic and the Liberal and the Southern countries narrowed, while fathers in Corporatist countries lagged behind. The time fathers spent on housework also increased over the study period, but to a lesser extent, except in the Nordic countries. Thus, it appears that fathers from

the Nordic countries continued to ‘set the bar’, with fathers from the Southern policy cluster ‘catching up’.

7. CHALLENGES FOR POLICY

Progress towards gender equality in housework and care is related to progress in the overall division of labour between women and men. Most of the move towards gender convergence in the domestic sphere has occurred because of the reduction in the time women spend on traditionally feminine-defined and less enjoyable domestic tasks such as cleaning. Nevertheless, the long-term trends suggest that men’s involvement is gradually changing, with men taking on more child care, which is considered the most enjoyable of the domestic and care tasks.

The progressive change argument is supported by time use data showing that the time women spend on housework has declined considerably and has increased slightly among men, while the time spent on child care has increased for both. The recent introduction and/or expansion of paternal leave regulations in many European countries also signals a shift at the institutional level in acceptance of shared parental responsibilities, even though this process is halting, and does not always have an immediate impact on behaviour (O’Brien and Wall 2017). In addition, there is evidence of relatively widespread changes in related gender attitudes. International Social Survey Programme data show that attitudes towards gender equality are continuing to change among younger cohorts of men. For example, across the Anglo-liberal countries, the Nordic countries, the Mediterranean countries, Japan, and the Corporatist countries of Central Europe, we see declines over decades in the percentage of younger men agreeing with the statement that ‘A man’s job is to earn money; a woman’s job is to look after the home and family’. In the Deloitte Millennial Survey of 2018, which included responses from more than 10,000 millennials across 36 countries, 48 per cent of millennial fathers said they would be willing to take a pay cut to achieve a better work–life balance. In the UK, seven out of 10 millennial fathers said they would consider their child-care responsibilities before taking a new job or promotion (Deloitte Millennial Survey 2018).

On the other hand, there is also some evidence for a stalling, or levelling off, of the trend towards gender equality in household labour and care in certain countries in which the process of gender convergence is more advanced. Whether this represents a ceiling beyond which gender convergence cannot continue without widespread institutional change remains to be seen. It could, however, also be argued that progressive change should always be regarded as a long-term, uneven process, and that large-scale changes are unlikely to occur over the course of just a few decades. Those at the forefront of movements promoting change will always face forces of conservatism who wish to preserve the status quo. Change may be stalled or even reversed by the deliberate resistance of political bodies, social movements, or institutions, such as movements associated with the growth of the populist new right, and family movements in the US that seek to severely restrict or ban abortion.

In terms of policy responses, there is a need for measures that support genuine work–family flexibility, while also providing parents with easy access to high-quality, affordable early child-care facilities. By making it easier for both partners to return to work after having a child, such measures can significantly enhance gender equality. Introducing paternity leave has also proved effective in encouraging fathers to spend time caring for their children, particularly when leave benefits involve meaningful periods of time, and are provided to fathers on a ‘use

it or lose it' basis (Brandth and Kvande 2019). However, these structural transformations are unlikely to happen as long as many workplaces are still dominated by a traditional, patriarchal management culture that rewards employees for working long fixed hours, being constantly available, and always prioritising work over family. A business culture that allows parents to work shorter or more flexible hours, enabling them to take time off when their children are sick (assisting them to flexibly make up the hours lost, for example from home), would go a long way to help overcome some of the hurdles in the path of gender equality in the division of labour.

8. CONCLUSION AND CHALLENGES FOR FUTURE RESEARCH

The challenge for future research is to understand how progressive change happens across time; i.e., to identify which factors promote it, and which factors hinder it. This will require a combination of existing methodologies with new longitudinal dimensions of explanation based on the trajectories of individuals and couples. The longitudinal dimension is represented in statistical modelling by life course analysis; i.e., the analysis of the life course trajectories of individuals, which can now be extended to multi-level modelling for longitudinal data. While quantitative research using longitudinal modelling to investigate these dynamics is a relatively recent innovation, it is likely to make an increasingly important contribution to the field. For example, recent research has used panel data to investigate how the gender division of domestic labour and care between partners is interconnected across their partnership trajectories, and how these trajectories are linked to events such as the birth of a child. The results of these studies suggest that gender-egalitarian attitudes and behaviour – reflected in, for example, the take-up by fathers of parental leave and flexible working – have life-long positive effects on gender equality (e.g., Killewald and García-Manglano 2016; Nitsche and Grunow 2016; Schober and Zoch 2019). Qualitative longitudinal studies that trace the same individuals and couples through time – as in the example of Grunow and Evertsson (2016, 2019) mentioned above – are also likely to make increasing contributions to our understanding of the micro processes involved in progressive change.

The increase in research focusing on longitudinal processes has influenced the recent development of a theoretical model that has drawn attention to the slow, cross-generational processes involved in achieving meaningful changes over time. The model of 'lagged generational change', advanced in Sullivan et al. (2018), takes a multi-level perspective that combines the idea of the recursive influence of the micro (interactional) and macro (institutional) levels with a longitudinal dimension based on individual and couple trajectories. In the specific configuration associated with the gendered division of unpaid work and care, this model links early gender socialisation in the family of origin (important in Deutsch's 1999 and 2020 research referred to above) to peer and spousal interactions in later life (as in the bargaining and marital power literature); all embedded within a wider context of gender ideologies, regulatory systems, and material constraints. In its current form, this model is relatively static, as it is designed to show why change happens only slowly. However, recent studies of the kind referred to above can help to elucidate the points at which dynamic elements of change may be introduced into it. For example, where a child has more liberal parents committed to non-normative gender practices, or where spouses share a common ideological commitment

to equality, or where a workplace is organised to cope flexibly with parental commitments, or where a wider shift in social policy increases the flexibility of parental leave benefits. All of these factors have been shown to be influential in promoting progressive change, and the elucidation of the processes involved in facilitating them is likely to be the major challenge facing future research in this area.

NOTE

1. This wider grouping still has its uses; for example, in the demonstration of the total value of all unpaid domestic and care work to national economies, estimated for the UK at over 25 per cent of the total value of GDP (Suh and Payne 2019).

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22. Couples' transitions to parenthood: Why the female partner's earnings advantage fails to predict efficient specialisation

Daniela Grunow

1. INTRODUCTION

All over Europe and beyond, men and women in newly forming couples have become more similar to each other with respect to their market and non-market skills. In the early twenty-first century, gender differences by educational level, time spent on housework, and early employment patterns have declined or even turned around, while homogamy has increased (Anxo et al. 2011; Blossfeld et al. 2005, 2015; Van Bavel 2012). In spite of these trends, the transition to parenthood continues to prompt couples to adopt gendered household production models, with the woman specialising in unpaid domestic (care) work and the man specialising in market production (Grunow 2019a; Grunow and Evertsson 2016a, 2019). It has been argued that this dynamic accounts for persistent discrepancies in men's and women's average aggregate time use, fostering gender inequality in human capital accumulation, a gender gap in earnings, and the further segregation of tasks within families over time (Gershuny 2018).

The claim that women tend to specialise in unpaid domestic work (including childcare) while men tend to specialise in paid work because the latter are the more productive earners and the former are the more productive carers has been put forward most prominently by the economic theory of the family (i.e., Becker 1981). Challenging Becker's theory, bargaining proponents have argued that both partners should have an interest in maintaining their market productivity rather than in specialising in unpaid domestic work. First, these scholars observed, because market work is paid, its rewards can be used and transferred more flexibly than domestic commodities. Second, they pointed out, market productivity determines each partner's future bargaining power over the allocation of time and resources within the family (Lundberg and Pollak 1993; Ott 1992). In light of these two theoretical strands, and given the massive gains women have made in terms of absolute and relative market productivity, the question of why gendered transitions to parenthood persist remains a puzzle.

A desire to solve this puzzle has motivated a growing body of research in the work–family field, which we review in this chapter. Most importantly, we seek to provide new insights into the mechanisms that lead couples to specialise in economically efficient and inefficient models of market production during the transition to parenthood. The chapter provides evidence that sheds light on the question of why egalitarian and other 'non-normative' models of production remain exceptional in co-residential heterosexual parental couples, despite being efficient. We refer to gendered production models as 'non-normative' when couples (1) maintain gender-balanced production models across the spheres of paid work and unpaid (care) work during the transition to parenthood; or (2) specialise in gender-atypical ways, i.e., the female partner specialises in market production and the male partner specialises in domestic produc-

tion (Grunow 2019b). The term ‘non-normative’ is used here based on the country context in which a couple lives. For example, a mother may return to her job soon after childbirth or for more hours than is the norm for her particular national context, or a father may engage in care work to an extent that is not typical in his particular country. In contrast, we refer to arrangements as ‘normative’ when couples specialise in gender-typical household and market production during the transition to parenthood, reflecting an orientation towards separate spheres for men and women (Davis and Greenstein 2009). The conceptual distinction between ‘normative’ and ‘non-normative’ couple specialisation was first introduced by Grunow and Evertsson (2019) and, as this chapter will show, it is key to understanding why couples often deviate from specialising in economically efficient ways.

2. COMPETING THEORETICAL PERSPECTIVES

2.1 Economic Theory of the Family

Based on the theory of comparative advantage, Gary S. Becker developed a Nobel Prize-winning economic model that was focused on family members maximising a joint household commodity production function by allocating their time to market and domestic production according to their ‘relative efficiencies’ (1981, p. 32). The approach initially rested on the assumption that resources for market and domestic production are complementarily distributed between the sexes. Becker proposed that in contrast to men, women ‘have a heavy biological commitment to the production and feeding of children’ (1981, p. 37), and would therefore be more willing to specialise in domestic work. Other scholars have argued that Becker’s proposition of women’s biological commitment was unconvincing in light of the bridge assumptions he used (Ferber 2003; Folbre 1986; Grunow et al. 2012); most importantly, the assumption that biological mothers have been the primary childcare providers ‘in virtually all societies’ (Becker 1981, p. 23). Instead, research has shown that childrearing was rarely exclusively tied to the biological mother in earlier historic periods and in non-western national contexts (Ahnert 2005; Bentley and Mace 2012; Hrdy 2000, 2012; Rotkirch 2000). Moreover, there is evidence suggesting that the framing of mothers as being primarily responsible for reproduction and care work has been a by-product of, and is essential to, the growing distinction between paid market work and unpaid domestic work following the onset of the Industrial Revolution (Berg 1992). Thus, there is a large body of literature showing that women’s primacy in domestic (care) work is not biologically determined, but socially created; and is, therefore, context-dependent and subject to social change (Bühlmann et al. 2010; Grunow and Evertsson 2016a; 2019).

Partly in response to his critics, Becker argued that his model of efficient specialisation based on comparative advantage worked even if differences in efficiency were not driven by ‘biological or other intrinsic differences’, and thus purely resulted from ‘investments in human capital’ (1981, p. 32). According to this line of reasoning, specialisation in the form of both ‘normative’ and ‘non-normative’ work–care arrangements would be possible purely based on the partners’ relative productivities. Consequently, household specialisation would, in principle, be gender-neutral (Blossfeld and Drobnič 2001; Gupta 2007). In recent decades, as women’s educational and occupational attainment levels have been increasing, and more longitudinal data on couples’ relative earnings trajectories and unpaid work trajectories have

become available, the number of studies refuting Becker's economic theory of the family has been rising, and researchers have turned to investigating alternative explanations for couples' 'normative' work–care divisions over time, and especially during the transition to parenthood (see also Baxter and Tai 2016; Coltrane 2000).

2.2 Bargaining and Economic Dependency

A recent review of the comparative empirical research on this topic published from 2000 onwards has shown that economic rationality still plays an important role in the search for the mechanisms that drive gendered work–care divisions (Grunow 2019a). Most importantly, proponents of the bargaining mechanism, also referred to as economic dependency (Basu 2006; Gupta 2007), have emphasised the existence of economic power relations in heterosexual couples that stem from comparative earnings advantages. Comparative earnings advantages influence the partners' allocation of time and other family decisions as a result of bargaining. Accordingly, the partner with the comparative earnings advantage uses his/her power to influence family decisions over work–care divisions and other aspects of family life (Lundberg and Pollak 1993; Manser and Brown 1980; Ott 1992; for a review see Gupta 2007). Following this line of reasoning, it would be in the best interests of both partners to keep unpaid domestic work to a minimum, and to invest in their own market productivity instead. As one partner's own market productivity increases (or decreases), the comparative earnings advantage shifts from one partner to the other. This situation, in turn, causes the partners to engage in bargaining, leading to a subsequent adaptation of the division of work and care. Bargaining and the adaptation of the work–care division may also arise due to new demands on the partners' allocation of time and effort, which can, for example, occur during family formation.

From this perspective, the transition to parenthood requires another consequential round of bargaining, as raising a child puts an enormous strain on the partners' capacities to engage in market production. Whether the partners participate jointly in the increasing amount of domestic (care) work or specialise in either domain should be a function of whether one partner has a comparative earnings advantage (for an extended discussion, see Grunow et al. 2012). Whereas parenthood is considered to increase the utility of both partners, it is also assumed that having a child will weaken the woman's bargaining position, and not the man's, because the mother is usually the parent whose employment is temporarily interrupted (Ott 1995). Indeed, motherhood earnings penalties are well documented in the literature. In some countries, including the United States (US), these penalties are completely explained by the time mothers spend outside the labour market, and by changes in mothers' work hours and employers. In other countries, including Germany, a considerable share of the motherhood earnings penalty remains unexplained, even after accounting for mothers' employment behaviour (i.e., Gangl and Ziefle 2009). It is, moreover, unclear (1) how large this penalty would be for mothers who returned to work immediately after their mandatory maternal leave ended; (2) why fathers are less likely to interrupt their paid work, especially when the partners have earnings parity; and, in particular, (3) how parenthood affects couples in which the female partner has a comparative earnings advantage over the male partner at the time of pregnancy.

3. COMPARATIVE EARNINGS ADVANTAGE AND PARENTHOOD: STATE OF RESEARCH AND CONCEPTUAL CONSIDERATIONS

According to the mechanisms suggested by the economic theories sketched in the previous section, a woman's comparative earnings advantage should lead to her partner specialising in the domestic sphere, while she specialises in paid work. This dynamic should occur during the relationship in general, and in particular during the couple's transition to parenthood. Thus, the higher the share of couples in which the woman has a comparative earnings advantage over her partner, the more widespread gender 'non-normative' work-care divisions should become. Based on data from the European Union Statistics on Income and Living Conditions, Klesment and Van Bavel (2015) have shown that the proportion of childless women who had a comparative earnings advantage over their partner varied between 20 per cent and close to 50 per cent across European countries in 2010. For mothers of children below age three, this proportion was much smaller, and varied between 3 per cent and 25 per cent. Similar estimates obtained from 2011 European Social Survey data indicated that the proportion of couples and families in which the female partner held a comparative earnings advantage was only slightly larger (Grunow 2013). These cross-sectional findings, though potentially biased by self-selection into parenthood, suggest that the female partner's comparative earnings advantage often fails to lead to economic specialisation among couples during the transition to parenthood. This interpretation is in line with the findings of longitudinal quantitative research, which shows that couples typically divide up both unpaid domestic work and care (Baxter et al. 2008; Grunow et al. 2012; Hamplová et al. 2019; Kühhirt 2011; Nitsche and Grunow 2016, 2018) and paid market work (Baxter 2013; Gonalons-Pons and Schwartz 2017; Grunow 2006; Schober 2013) in more gender-normative ways during the transition to parenthood, largely irrespective of the partners' relative earnings. In other words, research designs that have adequately captured the dynamics of the partners' relative earnings over time have frequently found no or only weak evidence supporting either Becker's economic theory of the family or bargaining/dependency approaches.

The repeated finding that the partners' relative earnings failed to predict specialisation during couples' transitions to parenthood has motivated a number of qualitative longitudinal studies in several European countries over the past 15 years. The aim of these studies was to determine for which couples (relative) earnings mattered, how their earnings mattered, and what alternative motivations may have been driving their decision processes and ultimate division of labour during the transition to parenthood. While these studies were open to alternative mechanisms emerging from the data, their main focus was on gaining deeper insights into the role played by internalised gendered parenting norms, given that sociological theories suggest that internalised norms drive gendered work-care divisions (i.e., West and Zimmerman 1987). The first of these qualitative studies was conducted in single European countries, largely separately from one another.¹ With the establishment of the TransParent network (Grunow and Evertsson 2016b) and the APPARENT project (Grunow 2017), these data were re-analysed using harmonised, purposeful (sub-)samples under a joint conceptual framework and research question. In addition, more studies were conducted in a wider range of countries, following a joint research design and interview guidelines (for details, see Grunow 2016). Most importantly, the joint conceptual framework and research design emphasised the analytical importance of recruiting and analysing couples in which the partners had resource parity at the

time of pregnancy, as well as couples in which the female partner had a comparative earnings advantage over the male partner at the time of pregnancy. For these couples, economically rational work–care divisions would lead to efficient but ‘non-normative’ specialisation, or to ‘normative’ but inefficient specialisation during the transition to parenthood. Thus, these couples were forced to reflect upon the importance they attached to economically rational decision making in light of the prevalent gender norms and other factors that could lead to changes in how they divided paid and unpaid work. In addition, the purposeful sampling strategy facilitated comparisons of couples’ accounts across countries (Grunow 2017).

In line with the available quantitative longitudinal evidence (Baxter et al. 2008; Grunow 2006; Grunow et al. 2012; Hamplová et al. 2019; Kühhirt 2011; Nitsche and Grunow 2016, 2018; Schober 2013), this qualitative research has shown that couples who had been practising relatively gender-balanced models of domestic and market production prior to the birth nonetheless specialised in gendered ways during the transition to parenthood (Grunow and Evertsson 2019). This shift had consequences for the post-birth earnings balance within the partnership, and rarely came as a surprise to the couples interviewed (Grunow and Evertsson 2016a, 2019). Instead, most of the couples reported that during pregnancy, they had anticipated – and, in some cases, carefully planned – a shift towards (or away from) gendered specialisation. Interestingly, the couples’ reasoning varied based on the gender of the partner who had the earnings advantage; i.e., they tended to emphasise economic reasons when the man had the earnings advantage, and to neglect or downplay economic reasons when the woman had the earnings advantage or the partners had similar earnings. Whether and, if so, how couples downplayed the woman’s advantage (or earnings equity) depended on both partners’ internalised parenting norms, especially their convictions concerning the existence of ‘natural’ maternal instincts and maternal (not paternal) duties towards the yet-unborn child (Evertsson and Grunow 2016, 2019). Regardless of which partner had the earnings advantage, the stories told by the parents(-to-be) revealed the influence of their internalised parenting norms. The views expressed by most of the couples reflected a belief in maternal primacy in care and separate spheres for men and women, although some of the couples expressed opinions that reflected a deep conviction that the partners should have joint responsibility for the child, and that work and care should be divided equally (Evertsson and Grunow 2019). Taken together, the available evidence suggests that specialisation is not a process that follows a gender-neutral economic script.

4. QUALITATIVE EVIDENCE OF GENDERED SPECIALISATION: A SUMMARY OF A COMPARATIVE STUDY CONDUCTED IN NINE EUROPEAN COUNTRIES

This section reviews the main findings from several cross-national qualitative projects that have studied the gendered meaning of money and of relative earnings advantages during couples’ transitions to parenthood in nine European countries. The research has been conducted in the framework of the cross-national TransParent network (Grunow and Evertsson 2016b) and the APPARENT project, a large cross-national mixed-methods study that was carried out between January 2011 and December 2016, and was supported financially by the European Research Council (Grunow 2017). The aim of this research was to provide answers to the following question: Why do couples who had been practising relatively gender-balanced

Table 22.1 Stylised overview of (in)efficient work–care arrangements by the gender of the partner with the earnings advantage

	Normative	Non-normative	
<i>Work–care arrangement</i>	Specialisation following separate spheres for men and women	Maintaining joint spheres	Gender-atypical specialisation
<i>Efficient</i>	♀ < ♂	♀ = ♂	♀ > ♂
<i>Inefficient</i>	♀ > ♂ ♀ = ♂	♀ < ♂ ♀ > ♂	♀ < ♂ ♀ = ♂

Note: Own depiction. Cells display whether the woman’s earnings are lower (♀ ♂) than the man’s during pregnancy.

models of domestic and market production start to specialise in gendered ways during the transition to parenthood? The present section utilises and further develops central components of the conceptual framework and empirical output produced in the APPARENT project (Grunow 2019b). We demonstrate the importance in both qualitative and quantitative research of distinguishing analytically between *the woman’s* and *the man’s* earnings advantage when seeking to understand what drives economically efficient and inefficient work–care arrangements during the transition to parenthood. Table 22.1 shows which post-birth work–care arrangements would be considered efficient depending on which of the partners has the earnings advantage among couples expecting their first child. Please note that, in contrast to Becker (1981), couples in which no earnings advantage exists are considered efficient when they maintain joint spheres because the family budget would be severely reduced by specialisation.

The following quotes stem from the harmonised data analyses of individual qualitative longitudinal interviews with 334 couples before the birth of their first child (Grunow and Evertsson 2016a), and 350 couples before and after the birth of their first child (Grunow and Evertsson 2019). The interviews were conducted in nine European countries. The quotes are taken from the country chapters published in two edited volumes, and are intended to illustrate the diverse types of reasoning presented by couples grouped in the different cells of Table 22.1. Thus, the following quotes are organised according to whether the couples were entering efficient or inefficient work–care arrangements, and which of the partners had an earnings advantage. Which of the partners had an earnings advantage was determined for each couple by a short, standardised questionnaire containing questions about both partners’ earnings, work hours, etc. The couples completed the questionnaire jointly, either immediately before or after the interview. The contextualised information on the partners’ work situations stems from the qualitative interviews. The symbols show which type of comparative earnings advantage existed in the couples during pregnancy and, thus, at the time when consequential decisions about the couples’ future work–care divisions and relative earnings were being made.

4.1 Couples Heading towards Efficient Specialisation

The following quote is from the Swiss case study. Aline, a management and sales clerk who was working close to full time and was married to Arnaud, an adult trainer who was working full time (♀ < ♂), said in a pre-birth interview: ‘I reckon we cannot have a great professional career and a family at the same time. I think one has to make choices and my choice is to say I want to dedicate a little bit to my children, but also keep some time for me’ (Girardin et al.

2016, p. 158). In this quote, Aline indicated that the couple's pre-birth plan was to specialise in the direction of separate spheres for men and women. Thus, she was arguing that women cannot 'have it all', while implicitly accepting that her partner Arnaud could, and perhaps had to do 'it all' now that he was becoming the family earner. She also framed the decision as her own choice, not as the outcome of a joint decision-making – much less a bargaining – process. In addition, Aline downplayed the consequences of her plan to reduce her work hours to 50 per cent (Girardin et al. 2019, p. 131). First, she neutralised the term 'dedication' by prefacing it with the qualifier 'a little bit'. Second, by revealing an apparently selfish motive for her plan, she was indicating that she did not anticipate being busy all the time, and that she expected to have some time for leisure.

The following quote is from the Austrian case study. Anna and Alex (♀ < ♂) were both working in public administration. The story told by this dual-earner couple sheds light on why 'objective' circumstances, such as the partners' respective earnings and the availability of childcare, sometimes had little effect on the father's willingness to take paid parental leave. Due to a lack of childcare options, Anna and Alex had initially planned for, and saw no alternative to, Alex taking four months of paid parental leave after Anna had exhausted her paid leave entitlement of 20 months. Even though Alex's pre-birth income was only slightly higher than Anna's, Alex ultimately did not take any leave. He explained: 'I really thought about it [claiming parental leave] for quite a while, but from an economic point of view. From an economic point of view, eh, yes. It would have been possible somehow, but, I somehow also didn't want to' (Schmidt et al. 2019, p. 116). This quote is illuminating, because it shows that Alex initially tried to justify his change of plans by citing economic considerations, but then realised while speaking that economic reasons were not really his main motivation. Since the difference in the partners' pre-birth earnings was small, and the couple had planned for Alex to take leave, the change of plans was more likely due to Alex's unwillingness to spend four months as the main carer of his child. The pre-birth interviews show that Anna had actually been more in favour of Alex taking parental leave than Alex himself had been. It appears that couples with this constellation – in which the woman favoured a 'non-normative' work–care division more than the man – often took a normative turn (Evertsson and Grunow 2019). Quantitative research has confirmed that when couples disagree on the question of joint and separate spheres, the partner who has the earnings advantage is more likely to get his/her way (Nitsche and Grunow 2018).

The next quote from the Czech case study illustrates this point even more clearly (Nešporová and Stuchlá 2016). Prior to the birth of their child, Miroslav, a car mechanic, earned more than twice as much as his partner Mariana earned as a clerk (♀ < ♂), even though they both worked full time (Grunow and Evertsson 2016a, p. 310). After the birth, Mariana stayed home full time, as the couple had planned. Thus, this couple fully adopted 'normative' work–care arrangements, and specialised more fully than the other couples quoted so far. Miroslav explained: 'Like, I don't know, I haven't heard from the boys that a man would take maternity leave. Well, when the two agree and like it that way or I don't know how it goes but the mother always stays at home, I think. And the man should earn money' (Nešporová and Stuchlá 2016, p. 249). This quote clearly reflects Miroslav's conviction that there should be separate spheres for men and women; a view that Mariana seemed to have shared. Even though Miroslav could have referred to his earnings advantage as an economic motive for the couple's 'normative' specialisation, the couple did not present this aspect as important.

More generally, the couples heading towards efficient specialisation clearly indicated both before and after the birth that they believed in separate spheres for men and women. Even though some of these couples also referred to economic considerations in line with the efficiency mechanism, couples heading towards other work–care arrangements did so as well, as we will see in the next section. It is, therefore, useful to compare the economic reasoning of couples heading towards efficient specialisation with that of couples heading towards inefficient specialisation.

4.2 Couples Heading towards Inefficient Specialisation

The next quote is from the Italian case study. Gaia, a female hairdresser, and her partner Giacomo, a gardener, had roughly equal earnings at the time of the pre-birth interview. However, Gaia ran an established hairdresser's shop, while Giacomo's job was informal and unstable ($\text{♀} = \text{♂}$). This constellation suggests that for this couple, a 'non-normative' division of work and care would have been the most rational economic choice. Instead, Giacomo presented himself during his pre-birth interview as the main family provider:

I would stay at home for about ten days because it's something new and to see things from the start, but then I would need to get back to my normal life ... for the baby's sake, too ... What can you do with only 30 per cent of your salary? [laughs] You have to pay for things at the end of the month. We have to pay rent. (Bertolini et al. 2016, p. 192)

Clearly, Giacomo was citing standard economic reasoning in this quote, while failing to acknowledge that his partner, Gaia, was earning the same amount of money, and that the salary loss he mentioned was going to occur in any case because Gaia was not working. When probed by the interviewer about why the couple had decided that Gaia should be the one to take leave and stay home, he appeared to struggle in his answer:

I think it's fair that way. I don't know ... I can't answer this question ... because it's convenient and because the mother is the mother. Not that I wouldn't be able to look after our child, but I think that this is also the right way of doing things. (Bertolini et al. 2016, p. 192)

Again, the case of Giacomo and Gaia shows that internalised gender norms are key to understanding the division of work and care in couples. It might be speculated that these norms also explain why Giacomo characterised himself as the family earner in the pre-birth interview, even though that was not based on the earnings information the couple had provided.

A more extreme example of the power of such internalised gender norms is provided by a quote from a couple's pre-birth interview taken from the Swiss case study. Christophe, the male partner, falsely presented himself as the main family earner, even though he was unemployed at the time of the interview, while his pregnant wife, Caroline, was employed full time, and was providing the family income ($\text{♀} > \text{♂}$):

My wife, she will probably work 80, maybe 60 [per cent of her full time job] ... and I'm gonna work 100 [per cent] ... that's for sure ... I'll be following the tradition where the father brings home the money and the mother ... she will look after [the child] ... because now we enter a circle where a lot of money has to be paid out to a childminder anyway ... you see what I mean ... taxes ... the childminder ... that costs 1000 to 1200 francs per month ... and plus taxes. If I earn ... 8000 francs ... in the end ... we earn ... 4000 and 6000 ... the difference is not great if my wife maintains 60 per cent

and keeps one additional day for the little one ... you see it is all stuff like this ... but I will work 100 per cent. (Girardin et al. 2016, p. 152)

Christophe was explicitly employing economic reasoning in this quote, but he was completely disregarding the fact that he was unemployed at the time, and that it was not yet clear whether and, if so, how much money he would be earning after the birth of his child. Since Caroline was the one with the stable job and earnings, Christophe would have been the more efficient care provider. However, this quote also illustrates that Christophe was determined to follow the 'tradition' of separate spheres for men and women.

The next quote, taken from the Czech case study, is another example of the male partner presenting himself as the main family earner, even though he was not. In this couple, the female partner, Gabriela, clearly earned more than her male partner, Gustav, prior to the birth, and was still providing more than 40 per cent of the family income after the birth, excluding her parental leave benefits (♀ > ♂). Nonetheless, Gustav presented Gabriela's contribution to the household income as if she was merely earning some pocket money for herself:

Well, we agreed on that [that she would also work]; we can say both of us did. Of course, again, it is more convenient when Gabriela wants to buy something, she can buy it and doesn't have to tell me, doesn't have to save money and so on. So, even for her I think it's more convenient even though she has a lot on her plate and sometimes feels that she'd rather give up working altogether; but, she can work from home, which is great. (Nešporová 2019, p. 213f.)

The views expressed by this couple, Gabriela and Gustav, exemplify an idea commonly found among couples specialising in gender-normative ways; namely, that the care of the child is the mother's sole responsibility, even if she continues working (Evertsson and Grunow 2019). In the case of Gabriela and Gustav, this meant that Gabriela continued to work 20 hours per week, at night when the child was asleep (Nešporová 2019). According to the interview excerpts, Gabriela clearly suffered from her dual burden as primary carer and part-time worker. Still, it did not seem to cross Gustav's mind to consider sharing the childcare, and it appears that Gabriela did not demand that he do so. Instead, she indicated during the post-birth interview that she had seriously considered quitting her job. This dynamic, in which a working mother felt overburdened and discouraged from continuing to pursue her career, was commonly found among the couples interviewed (Grunow and Evertsson 2019). Thus, it is likely that the motherhood earnings penalty and the motherhood employment gap, which are well documented in quantitative research, are attributable in part to a lack of hands-on support at home for mothers, who continue to be considered – and to consider themselves – the primary carers.

4.3 Couples Heading towards Efficient 'Non-Normative' Work–Care Arrangements

This section features quotes from couples who efficiently specialised in 'non-normative' ways, and offers interpretations of these quotes based on the country context in which the respective couple was living. As we explained in the introduction, a non-normative arrangement is defined as one in which the new mother returns to work more quickly or for more hours than would be the norm in this particular national context, and/or the father changes jobs or reduces his paid work hours in order to engage in care work to a greater extent than his peers. The work–care arrangements adopted ranged from sharing work and care equally

to gender-atypical specialisation. Among the couples who reported planning to enter an efficient 'non-normative' work-care arrangement, some consciously and actively rejected a gender-normative transition to parenthood. An example of such a couple are Elke and Erik (♀ > ♂), whose interviews were part of the German case study. Elke explained:

Well, when we talked about children, for me it was absolutely clear that I'm not going to take a break from my job. And that I'm not going to choose the model where you stay at home for three years and then return to work ... Without working, I would miss something. It is the same for [my husband] as professional self-fulfilment is important ... And I think that both of us would become unhappy very quickly with the role as housewife or househusband with child. (Dechant and Rinklake 2016, p. 116)

This quote presents continuing to engage in paid work not primarily as a means to obtain economic resources, but rather as a path to professional fulfilment that has a non-monetary value for both the mother and the father. This line of reasoning, which was frequently cited in the interviews conducted in the various countries, offers a non-economic perspective on dual-earner arrangements.

A related, though more utilitarian perspective on continued dual employment was offered by Ginevra, who was earning more than her partner, Giuseppe, both before and after their child was born (♀ > ♂):

Yes, we're thinking that we will both continue to work because it also guarantees our possibility of living a better life: children are expensive, they are so cute, and so with current salaries and the cost of living, a single salary is not enough, but then I also like the idea of working. (Bertolini et al. 2016, p. 187)

After being probed by the interviewer about how certain she was about their plans, Ginevra elaborated:

Well [partner's name] doesn't know, but I won't change my mind, I'm sure that work can be reconciled with family life, and it's important to understand that in Italy, too, in the sense that all over the world there are women who have also become executives and manage to have a family in a balanced way, so it's only right that we Italians should be doing the same, we have to convince ourselves, I am convinced of this. (Bertolini et al. 2016, p. 187)

As this quote illustrates, Ginevra and Giuseppe, who participated in the Italian case study, were determined to share paid work and care in a way that they considered unusual in the Italian context; a view that is supported by quantitative research (Buchler 2019). Ginevra did not want to reduce her working hours after giving birth, as her job was highly paid and she had good career prospects. Giuseppe agreed with her decision, and was willing to adjust his expectations accordingly. They had planned to use day care so that they could both continue to work, but because Giuseppe lost his job after the birth, the child went to a day-care centre part time, and Giuseppe took care of the child for the rest of the time while Ginevra continued working full time.

Whereas Ginevra and Giuseppe and Elke and Erik exemplify a group of couples who indicated that they were determined to adopt and maintain 'non-normative' work-care arrangements after having a child, other couples opted for 'non-normative' work-care arrangements mainly out of financial necessity or as a way of securing the more stable source of income. Hana and Honza (♀ > ♂), who participated in the Czech study, exemplify this latter group.

Hana was a successful financial adviser who was working full time and investing heavily in her career soon after giving birth, whereas Honza stayed home because he was unemployed. The interviews with Hana indicate that violating social norms of male breadwinning and female homemaking caused the couple to suffer, as they were frequently criticised for their work–care arrangements by their parents and by colleagues at work. Hana explained their work–care trajectories in the following way:

[In order to secure a higher position] I had to work very intensively for three months. That was the reason that I really saw Hugo [the son] only in the evenings. I was a bit of a heartless mum I admit. But, then again, I knew that if I worked very hard I would have more time [later on], that I could make up the time some other way. (Nešporová 2019, p. 214)

Later in the interview she elaborated: ‘Both [my] parents were clearly unhappy from the beginning that Honza was at home so much, that is, they were uncomfortable with the woman working and earning money and the man staying at home with the child; but I put that down to normal generational prejudices’ (Nešporová 2019, p. 215). Hana tried to distance herself from the criticism she received for violating the motherhood norms that were widely shared in the Czech Republic (Nešporová 2019; Buchler 2019). Still, nine months after the birth of their child, the couple gave in to these pressures by returning to a more socially accepted work–care arrangement. Hana hired Honza as her manager so they were able to divide their paid and unpaid work equally (Nešporová 2019).

The case of Hana and Honza is illustrative for many of the ‘non-normative’ interviewed couples. In most contexts, dominant gender norms made it difficult for the efficient ‘non-normative’ couples to realise or maintain the work–care division they desired, or felt forced to adopt in order to get by financially. Thus, having to deal with disapproval and judgement by relevant others (i.e., family, colleagues, bosses) was frequently reported by the ‘non-normative’ couples, although there were also cases in which relevant others provided explicit normative and practical support (Evertsson and Grunow 2019). Most notably, the couples’ stories show that the financial benefits associated with efficient ‘non-normative’ specialisation often come with high normative costs. It appears that only the couples who were truly determined to maintain a gender-balanced work–care division were able to resist engaging in gendered specialisation in the medium run (Evertsson and Grunow 2019). This observation is backed up by recent quantitative research, which has described efficient ‘non-normative’ couple arrangements in which both partners maintained egalitarian gender ideologies and practices throughout the transition to parenthood as ‘egalitarian island couples’ (Nitsche and Grunow 2018, p. 1). This type of couple appears to be ‘relatively immune to traditional outside gendered expectations. Hence, they are “more free” to teamwork fair solutions for both partners, in terms of time and energy investments in paid and unpaid work’ (Nitsche and Grunow 2018, p. 10). In other words, these couples likely adopted and maintained efficient work–care solutions because they felt free to do so.

4.4 Couples Heading towards Inefficient ‘Non-Normative’ Work–Care Arrangements

The normative costs discussed in the previous section also affected couples who opted for inefficient ‘non-normative’ work–care arrangements. In addition to these normative costs, the inefficient ‘non-normative’ couples were willing to accept the financial costs of their preferred

work–care arrangement. An example of such a couple are Maria and Patrik, who participated in the Swedish study. Maria, a social community planner, was earning more than Patrik, a lighting technician (♀ > ♂). They stressed their dedication to sharing their parental leave equally, with each taking about seven months of full-time leave, even though engaging in gender-atypical specialisation would have been more efficient financially. Patrik characterised their decision as ‘obvious’:

It was rather obvious that we would share it equally ... it felt natural. Maria was quite determined from the start that we would share it exactly equally, while I thought ... Well, that's our starting point, but if it differs a bit here or there, it's not that important to me ... Someone might want to start working sooner [than planned] ... or someone wants to stay on parental leave longer, or you don't get exactly the same amount of leave due to the summer vacation. (Alsarve et al. 2019, p. 70)

Upon being probed by the interviewer about whether he was satisfied with having shared the leave equally, or would do it differently based on his experience, he responded: ‘No, no. It was great. I've also had the possibility to see all this ... Like, when you're at home all day on your own, then you really long for the other [parent] to come home and help and take over ... To share the responsibility’ (Alsarve et al. 2019, p. 70).

In the case of Patrik and Maria, it is important to stress that in Sweden, parental leave is financially very well compensated, and that fathers taking care leave is widely accepted (Alsarve et al. 2019, p. 68f., 83f.). Consequently, neither partner was worried about or actually experienced negative repercussions at work for having taken paid leave. Thus, even though it is uncommon in Sweden for a couple to share leave equally, the economic and non-economic costs Patrik, Maria, and their ‘non-normative’ Swedish peers were facing were clearly lower than those faced by their non-Swedish peers.

An example from a context that is largely unsupportive of joint caring comes from Poland. The following quote is from an interview with Gabriela, a non-governmental organisation manager, and her partner Gustaw, a manager in a private company. Gabriela and Gustaw had similar earnings (♀ = ♂) at the time of Gabriela's pregnancy. After the birth of their child, Gustaw voluntarily changed jobs to be able to spend more time with the child, even though the new job paid less. His adjustment was meant to compensate for the fact that Gabriela had to reduce her working hours after the birth, which appeared to frustrate her: ‘My professional life [long pause] is like this: a) I think I still work a lot, but b) I am constantly frustrated because before [childbirth] I could do much more, both in terms of interesting stuff [work-related projects] and earning money, because those two are connected’ (Reimann 2019, p. 196).

Later on in the interview, Gabriela elaborated on why she and Gustaw chose to accept that both of their incomes would be lower: ‘our relationship is built on partnership and equality, when it comes to finances and everything else. Also, neither of us has a job that would provide for the other’ (Reimann 2019, p. 196).

The example of Gabriela and Gustaw exemplifies how highly some of the couples interviewed valued equality and jointly sharing the spheres of paid and unpaid (care) work. Especially in the Polish study, we found that many couples were willing to cut back on work in order to maintain this level of equality (Reimann 2019). While these inefficient ‘non-normative’ couples were a small minority in the whole sample of the couples analysed in the context of the APPARENT project, these cases call into question the relevance of household bargaining and economic advantage among European couples today.

In light of the economic and non-economic reasoning that was observed among the other groups investigated – namely, the couples who were specialising efficiently in ‘normative’ and ‘non-normative’ ways – it is safe to conclude that relative earnings advantages did not greatly affect how the parents-to-be decided to divide up their work and care responsibilities, nor how the new parents ultimately did so. The evidence found in the qualitative research clearly confirms the available quantitative evidence that parenthood frequently has negative career and earnings consequences for mothers. It also confirms that the increased volume of unpaid domestic work associated with the birth of a child is mostly taken on by mothers, and only very rarely by fathers. However, while these dynamics clearly lead to motherhood wage penalties and maternal career breaks, they are not a causal result of women’s earnings disadvantages during pregnancy.

5. CONCLUSIONS

Our aim in this chapter was to explain why the woman having an earnings advantage frequently fails to predict efficient specialisation within a couple during the transition to parenthood. We provided a review of recent research and theory on the economic and non-economic mechanisms that may explain gendered transitions to parenthood. The evidence presented here yields four main conclusions. First, couples are most likely to specialise and to maintain economically efficient work–care arrangements during the transition to parenthood in cases in which the male partner is earning more than the female partner prior to the birth. While this type of comparative advantage is shrinking, it is still dominant in Europe (Klesment and Van Bavel 2015), and it aligns well with prevalent norms emphasising the mother’s primacy in care and the father’s primacy in market production (i.e., intensive parenting, see Grunow et al. 2018). However, we found very little evidence to support the claim that the male earnings advantage causes gender-normative specialisation. Second, couples tend to specialise and to adopt economically inefficient work–care arrangements in cases in which the female partner is earning more than the male partner prior to the birth (Grunow et al. 2012, 2018). Thus, it appears that internalised norms regarding separate spheres for men and women, and especially of the ‘good’ mother, overrule production efficiency in family decision making (Evertsson and Grunow 2019). Third, even when the female partner has an earnings advantage, economically efficient specialisation occurs only in exceptional cases. This may, for example, occur if (1) both partners express and maintain a strong commitment to supporting joint spheres and egalitarian gender norms, irrespective of the disapproval of or the negative sanctions imposed by extended family, bosses, or colleagues (Evertsson and Grunow 2016, 2019); or (2) the male partner is unable to engage in market production, or can work but would earn too little income to provide for the family. In this latter case, couples often engage in efficient specialisation only temporarily, and then switch to an (often inefficient) model as soon as the male partner finds a job that provides sufficient income (Evertsson and Grunow 2019). In the former case (dual commitment to joint spheres), couples appear likely to adopt and maintain efficient work–care arrangements (Nitsche and Grunow 2018). Qualitative research has shown that there are also cases in which egalitarian-minded couples adopt inefficient work–care arrangements in line with their values; although how widespread or stable this pattern is remains unclear. Fourth, in contrast to model-based assessments that have argued that gender-balanced work–care arrangements are inefficient per se (Becker 2009), we conclude that contemporary

families are well advised to adopt a gender-balanced division of market and domestic production that can sustain the family income even if the family is disrupted or the main earner loses his/her job. A multitude of studies from Europe and the US have identified continued maternal employment and paternal time investment in childcare as work–care strategies that can help protect both parents and children from adverse effects of economic uncertainty and marital instability (i.e., Aassve et al. 2007; Cooke 2004; Erola and Jalovaara 2017; Killewald 2016; McLanahan and Percheski 2008; Smock et al. 1999). Thus, Becker's (2009) perspective on household efficiency rests on model assumptions that are no longer relevant in contemporary families.

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NOTE

1. In the Netherlands, Wiesmann (2010) conducted qualitative interviews with parents-to-be in 2004–2005; a mini-panel derived from a small sub-sample of the Netherlands Kinship Panel Study. In Germany, qualitative interviews with parents before and after the birth of their first child were conducted at the Institute for Family Research at the University of Bamberg between 2006 and 2007. During the same period, the Swiss Devenir Parent project started conducting several waves of qualitative interviews with parents before and after the birth of their first child (Le Goff and Levy 2011). In Austria, several waves of qualitative interviews with parents-to-be were conducted between 2013 and 2015. Following the German sampling strategy and interview guidelines, additional cross-nationally harmonised qualitative data collections were conducted in Sweden (2009–11), Italy (2010–15), Spain (2011–13), Poland (2011–14), and the Czech Republic (2011–14); for an overview, see Grunow (2016).

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23. Family sociological theories questioned: Same-sex parent families sharing work and care

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1. INTRODUCTION

The rapid progress in the legal recognition of same-sex couples that has occurred in recent decades has contributed to an increase in the number of children brought up in these families. Together with the legitimisation of same-sex unions in many European countries, several pathways to parenthood for these couples have emerged, including co-adoption, second-parent adoption, donor insemination, in-vitro fertilisation (IVF), and surrogacy. While these legal developments indicate that levels of acceptance of LGBTQI¹ families have been rising, this progress has not been universal. As of May 2019, same-sex parenthood was not yet legally recognised – i.e., same-sex couples were not permitted to adopt or to access medically assisted insemination (MAI) – in a number of European countries, including the Czech Republic, Italy, Lithuania, and Poland (ILGA-Europe 2019). Moreover, in February 2019, the Dutch National Healthcare Institute demonstrated that earned rights are also reversible by announcing that health insurance providers are no longer required to cover the cost of artificial insemination for female same-sex couples, and that only couples with a medical condition associated with infertility will be covered (National Healthcare Institute 2019a). In response to pressure from activists and interest groups, this measure was put on hold pending the outcome of further deliberations in 2020 (National Healthcare Institute 2019b). In this chapter, we focus on the Netherlands and the bigger Nordic countries of Sweden, Norway, Denmark, and Finland. These countries were international leaders in the legalisation of same-sex union formation, marriage, and parenthood. However, as much of the literature on same-sex couples stems from the United States (US), we discuss studies conducted in the US (and in other countries) that report patterns, experiences, and narratives that may be applicable to couples across contexts.

The aim of this chapter is to critically evaluate and discuss family sociological theories and perspectives from the point of view of same-sex couples and families. We also discuss the legal developments for same-sex marriage and parenthood in the countries in our study sample. In particular, we discuss how, when, and why the experiences of same-sex parent families challenge traditional family sociological theories. Focusing on the division of paid and unpaid work, and care, our two main questions are as follows: First, to what extent do – often supposedly gender-neutral – theories hold when the family being studied is not a heterosexual, nuclear family? Second, where does the inclusion of same-sex families leave us when it comes to formulating a family sociology for the future?

Before we start, it is important to clarify our terminology. When we refer to same-sex, lesbian, and gay couples or parents, we base the categorisation on individuals' (or their partners') reports of their sex in surveys or interviews, or the sex reported in population registers. This definition does not necessarily correspond with individuals' sexual identity or experience

of gender, and this is a limitation that is worth keeping in mind. It should also be noted that when it comes to the concept of *family*, the LGBTQI community has historically had a more inclusive definition of what constitutes a family than the general public (Hull and Ortyl 2019; Weston 1991). In this chapter, we define family more narrowly as consisting of parents and children. Although our definition may not always correspond to that of the individuals we focus on, it enables us to use the experiences of same-sex parent families as a lens through which we can analyse the traditional family sociological field. This field is rooted in a heteronormative² concept of a family as consisting of a mother, a father, and one or more children.

2. CONTEXT, THEORIES, AND PRIOR RESEARCH

In Europe, the number of countries that have legalised same-sex unions and parenthood increased from zero in 1985 to 24 in 2019 (Waldijk 2018). The Nordic countries were among the first to acknowledge same-sex relationships through legislation on registered partnerships. Denmark took the lead in 1989, followed by Norway (1993) and Sweden (1995). The Netherlands joined this list in 1998, and Finland joined it in 2002 (Frantzen 2011; Waldijk 2017). Second-parent³ and joint adoption by same-sex couples has been permitted since 1999/2010 in Denmark, since 2002/2009 in Norway, since 2009/2017 in Finland, and since 2003 in Sweden. In the Netherlands, same-sex couples have been allowed to adopt domestically since 2001, and internationally since 2009. Lesbian couples have been permitted to use MAI and IVF services in clinics (private and public) since 2002 in the Netherlands, since 2005 in Sweden, since 2006 in Denmark, since 2007 in Finland, and since 2009 in Norway (Evertsson et al. 2020).

Having access to MAI/IVF has made it much easier for lesbian couples to become parents. Male same-sex couples have transitioned to parenthood in smaller numbers, partly due to the difficulties these couples face in asserting formal adoption rights. Surrogacy (i.e., when a woman agrees to become pregnant and give birth to a child on behalf of another person or couple who will be the child's parent(s)) is illegal in Finland and Norway, and is not legally recognised or regulated in Sweden and Denmark (Evertsson et al. 2020). The Netherlands allows altruistic, but not commercial surrogacy. This means that it is illegal to advertise for a surrogate, or to pay a surrogate more than an amount that covers her health-care expenses and other costs related to pregnancy and birth.

Historically, research on same-sex couples was dominated by qualitative studies. This is partly because many of the research questions posed are concerned with the experiences and narratives of individuals, which are best investigated through in-depth interviews. Moreover, the options for quantitative research were limited, as same-sex couples were difficult to identify in quantitative data sources. But as legal recognition of same-sex couples has expanded, the attention paid to these couples in quantitative studies has also increased. Even so, because the numbers of such couples are small, attaining a sample large enough to make statistical claims about how same-sex couples divide work and care has been challenging. Research in this field has relied on data from population registers (e.g., Aldén et al. 2015; Evertsson and Boye 2018; Kolk and Andersson 2018), large-scale surveys or censuses (e.g., Jaspers and Verbakel 2013; Jepsen and Jepsen 2015), surveys that oversampled the LGBTQI population (e.g., Fischer et al. 2016; Perlesz et al. 2010), or combined multiple surveys (e.g., van der Vleuten et al. 2021). A recurring problem has been that it is difficult to reliably identify same-sex couples in data

not meant to (over)sample this group (e.g., Gates 2010). In a review of data from countries that legally recognise same-sex unions, Cortina and Festy (2014) pointed to problems with the various measurements used, and recommended caution when making international comparisons of same-sex couples and families.

Because parenthood is rarer for male than for female couples, there is less research on gay fathers than on lesbian mothers (Doucet and Lee 2014; Moore and Stambolis-Ruhstorfer 2013). Among the common themes that emerged in earlier research are identity formation (e.g., Hequembourg and Farrell 1999), the desire to procreate (e.g., Bos et al. 2003), paths to parenthood (e.g., Chabot and Ames 2004; Malmquist and Nelson 2014), well-being and school outcomes among children (e.g., Aldén et al. 2017; Boertien and Bernardi 2019; Mazrekaj et al. 2019), parental stress (e.g., Bos 2010), encounters with health-care providers (e.g., Malmquist 2015), and experiences navigating the legal system (e.g., Compton and Baumle 2015; Park et al. 2016). In this chapter, we focus on the division of work and care in same-sex parent families and couples, and examine the extent to which the research findings map onto or challenge traditional family sociological theories and perspectives.

3. THE DIVISION OF WORK AND CARE: THEORETICAL PERSPECTIVES AND EMPIRICAL EVIDENCE

3.1 The Division of Paid and Unpaid Work

According to *specialisation theory*, the gendered division of work in heterosexual couples can be explained by the desire of the partners to maximise household utility (see also Grunow in this volume). In order to maximise utility, the partner with the comparative advantage in labour market work (i.e., the one with the highest expected returns or wages) should specialise in paid work, whereas the partner who is most proficient in care and housework should specialise in those tasks. By specialising, each partner gets better at what they do (e.g., either earning money or producing cost-efficient and healthy meals, providing care, etc.). Following Becker's (1991) reasoning, we would expect to observe fewer benefits from specialisation among same-sex couples because the partners lack physiological sex differences (in particular, that only one partner is able to give birth and breastfeed), and have similar experiences of socialisation and of potential sex discrimination in the labour market. Indeed, studies that compared same-sex couples to different-sex couples have found that same-sex couples distribute housework more equally than their heterosexual counterparts (see Goldberg 2013 for a review). It has also been reported that compared with different-sex couples, specialisation is less common in male (e.g., Goldberg 2010; Kurdek 1993, 2007; Perlesz et al. 2010) and in female same-sex couples (e.g., Aldén et al. 2015; Antecol and Steinberger 2013; Evertsson and Boye 2018; Perlesz et al. 2010). This pattern has been found in several countries (Bauer 2016; Evertsson and Boye 2018; Jaspers and Verbakel 2013; Moberg 2016; Perlesz et al. 2010; Van der Vleuten et al. 2021). Overall, these findings are in line with expectations from specialisation theory (Becker 1985, 1991).

Even small differences in relative advantages in performing paid work and care tasks may have long-term effects on family utility once couples specialise. Full specialisation is seldom financially beneficial for any working-age couple in societies in which childcare is subsidised or inexpensive, and/or the gender wage gap is small. Still, partial specialisation may be

beneficial, especially during the early childrearing years. According to Becker (1991), the benefits of specialisation increase with the length of the relationship and with the degree of formalisation. Using survey data from seven countries, Bauer (2016) found that specialisation increased in lesbian couples over time (see Grunow et al. 2012 for heterosexual couples in Germany). However, Aldén et al. (2015) reported that specialisation did not increase among lesbian couples in Sweden after they formalised their union by registering the partnership. Their findings also indicated that for gay couples, entering a registered partnership increased the probability of income pooling. In the Netherlands, Jaspers and Verbakel (2013) found that cohabiting same-sex and different-sex couples were not only significantly different from each other in terms of their division of paid work, but also that different-sex couples specialised more than same-sex couples did after marriage.

Becker's theory leaves no room for power differences or differences in preferences between the partners (England and Budig 1998). A theory that considers such factors is the *relative resource or bargaining perspective* (Blood and Wolfe 1960; Lundberg and Pollak 1996). When their preferences differ, the partners need to negotiate the outcome. In such negotiations, the partner with more resources has more power and will be better positioned to negotiate her or his preferred deal. Examples of power resources are income, love and levels of relationship commitment, and the social transfers, often linked to parenthood, the partners are entitled to receive if they decide to leave the relationship (e.g., England and Farkas 1986; Lundberg and Pollak 1996). While research has shown that, on average, same-sex couples share housework more equally than different-sex couples do, when disparities are reported, differences in time and resources often shape the distribution between the partners.⁴ These findings suggest that same-sex couples, as well as different-sex couples, are influenced by status and power differences (Goldberg 2013, p. 88).

The question of how *gender* should be conceptualised and understood in same-sex couples has been of major interest in the field. According to West and Zimmerman (1987), gender is not a static characteristic, but is instead constructed through everyday actions and interactions with others. When individuals 'do gender', they conduct themselves in a manner that is in line with the activities expected of their sex category. The doing of gender becomes a self-regulating process in which individuals monitor their own and others' behaviour. If 'doing gender' is unavoidable and is present in everyday interactions, it should also be a driving force in how lesbian and gay individuals spend their time. Like West and Zimmerman (1987), Butler (1990) conceptualises gender as performative. However, Butler (1990) puts the construction of gender outside of the self, thereby integrating discourses of power as well as sexuality. Important contributions have also come from Black feminists (Collins 1990; Crenshaw 1989), who have identified gender as 'an axis of oppression intersecting with other axes', such as sexuality and race (Risman and Davis 2013, p. 742). According to Risman and Davis (2013), theorising gender as a system that intersects multiple axes of inequalities has become 'the new consensus' among social scientists.

Some researchers have characterised same-sex couples, and particularly lesbian couples, as being essentially 'gender-free'. This assumption builds on the argument that the absence of the male–female juxtaposition makes it impossible to assign household and work according to traditional gender roles (Dunne 1998; Evertsson and Boye 2018; Perlesz et al. 2010). However, even if gender polarisation is absent, gendered practices may not be. For example, Carrington (1999) found that lesbian women tended to over-report, while gay men tended to under-report, the time they spent on domestic work. According to Barrett (2015), lesbians who perform little

housework and gay men who perform a lot of housework may be subject to stigma for challenging gender norms. In the Netherlands, Jaspers and Verbakel (2013) found that it was more common for male same-sex partners to both work full time, whereas it was more common for female same-sex partners to both work part time. In other words, many of the couples acted in line with gender norms and expectations for men and women.

In a critique of LGBTQI family studies for not paying attention to butch and femme⁵ gender identities, Lev (2008) stressed the importance of acknowledging that the lesbian identity is multifaceted and complex. Butch-femme couples might be rendered invisible by the dominant sameness narrative often ascribed to lesbian households. Lev argued that from the outside, a butch-femme couple might appear to be heteronormative, or to be imitating a heterosexual couple, even though their relationship is not gender-hierarchical or traditional 'from the inside' (2008, p. 137). Also among heterosexual couples, identities, gender ideals, and norms can diverge, which challenges the notion that 'woman' and 'man' are universal, homogenous categories (Hines 2015). Yet it appears likely that (hetero)normative family ideals and scripts influence different-sex couples more than same-sex couples (Goldberg 2013; Tornello et al. 2015).

3.2 Transition to Parenthood and the Division of Work and Care

When couples become parents, within-couple specialisation often arises in response to the dual pressures of caring for a young child while financially maintaining the household. Research on different-sex couples has also identified the transition to parenthood as the most important factor contributing to gender inequalities in the labour market and in the home (Angelov et al. 2016; Cooke 2014). In one of the first qualitative studies of the transition to parenthood among lesbian couples, Goldberg and Perry-Jenkins (2007) found few indications of specialisation; reporting that in the 29 couples they interviewed, the equitable division of domestic work was maintained. Based on a study of the division of work among 66 lesbian and heterosexual parents, Patterson et al. (2004) found that egalitarian ideals were more important for the division of work in lesbian couples than in heterosexual couples. They observed that in the latter group, structural factors such as work hours and number of children had more weight in predicting the division of childcare and housework. Using register data, Evertsson and Boye (2018) investigated the division of parental leave in female same-sex and different-sex couples in Sweden. During the study period, the parents could share 480 days of leave between them. Their results showed that the amount of leave taken by the birth mother (i.e., the mother who gave birth to the child) was considerably greater than the amount taken by her partner in both same- and different-sex couples (see also Moberg 2016). Although same-sex parents are not expected to 'do gender' by doing difference (i.e., to 'do' motherhood and fatherhood) (West and Fenstermaker 2002), norms on breastfeeding and the child's need for its birth mother are strong. Consequently, birth mothers typically take the first and the longest leave period. However, social mothers usually take a much larger share of the leave than heterosexual fathers do, which indicates that gender norms play a role in within-couple divisions of work and care in different-sex couples (Evertsson and Boye 2018; see also Rudlende and Lima 2018 for Norway). In line with this observed pattern, and partly as a consequence of it, studies that compared income development in same-sex and different-sex couples in Sweden and Norway have shown that five years after childbirth, the income gap was non-existent in female

same-sex couples, whereas in different-sex couples, the father typically had a notably higher income than the mother (Eckhoff Andresen and Nix 2019; Moberg 2016).

Rosenbaum (2019) studied female same- and different-sex couples who adopted a child in Denmark, and found that female same-sex couples tended to share the leave more equally than different-sex couples did. In addition, Moberg (2017) found that the share of the leave taken by each of the parents in different-sex couples was similar regardless of whether the children were biological or adoptive. Among the advantages of focusing on adoptive parents are that in these couples, the impact of physiological differences linked to sex is eliminated, as neither of the (same-sex or different-sex) parents are breastfeeding or suffering from birth-related health problems; and they all face a similar prolonged process of becoming parents. Rosenbaum's (2019) results indicated that heterosexual mothers experienced greater financial penalties than lesbian mothers did after having a child. This was mainly because heterosexual mothers were more prone to reduce their working hours after childbirth. Rosenbaum (2019) found little evidence that within-couple bargaining or relative resources influenced the child penalty. Even lesbians with low bargaining power (and low relative resources) were shown to experience smaller penalties after having a child than heterosexual mothers. In other words, the evidence indicates that gender was of greater importance than relative resources.

A notable difference between lesbian and heterosexual parents is that a lesbian couple can choose to 'switch' the partner who bears the child if they want more than one biological child. Following Becker's reasoning (1985, 1991), the rational choice would be to have the same partner serve as the birth mother, given that the partner who gave birth to the first child has already invested heavily in home production. It appears, however, that Becker's prediction does not hold for many lesbian couples. Perhaps not surprisingly, research has shown that the choice of the birth mother has a significant impact on the income gap for same-sex couples. There is, for example, evidence that couples who switch the birth mother from the first to the second child have more similar income trajectories than couples who do not (Moberg 2016).

The division of labour among gay fathers has not received as much attention as that among lesbian mothers (Oerton 1997; Tornello et al. 2015). Tornello et al. (2015) were among the first to investigate how gay fathers distribute paid and unpaid work, including childcare responsibilities. In a study of 52 gay couples who became parents through surrogacy, they found no correlation between income and participation in housework, and thus dismissed the relative resource perspective. Time constraint theory, however, predicted both the division of childcare and housework among these fathers, as, on average, the spouse who spent fewer hours in paid employment performed more of the unpaid work in the home. Still, it is worth noting that decisions regarding time use are often linked to income. It is, therefore, possible that relative resources (or initial income) and couple bargaining determined which (if any) of the partners reduced the time spent in paid work.

3.3 Negotiating Parenthood in a Heteronormative Context

When lesbian women and gay men become parents, they not only challenge hegemonic notions of masculinity and femininity (Stacey 2006) or of gay and lesbian identities, but the meaning of parenthood and family, as they are situated 'at the heart of broader discussions of family politics' (Moore and Stambolis-Ruhstorfer 2013, p. 493). Fatherhood and motherhood have different cultural meanings, and the question of how these meanings influence and inform the social lives of gay and lesbian parents has long been of interest to scholars. Hequembourg and

Farrell (1999) argued that lesbian motherhood is a complex identity, intersecting a marginalised position (sexual minority) with one of the most revered female mainstream identities: namely, motherhood. Interviews with lesbian birthmothers, stepmothers, and social mothers have shown that lesbian mothers tend to develop strategies for maintaining their motherhood identity as well as their lesbian identity; and an awareness of where, when, and for whom each of these identities is needed. In line with Hequembourg and Farrell (1999), Moreira's (2018) study of lesbian/queer mothers in Spain showed that the interviewees needed to 'justify themselves as being "good" mothers or in "normal families"' (Moreira 2018, p. 15). This observation is also in line with reports from interviews with divorced lesbian mothers, which indicated that these women were struggling to deal with messages of blame for violating the heteronormative model of married/cohabiting parenthood by divorcing (Allen and Goldberg 2019).

Meanwhile, fathers in same-sex relationships often report having to navigate a world that considers several key aspects of their identity irreconcilable (Carroll 2018a). The literature has documented how gay fathers who are exposed to discrimination in the process of becoming parents experience and react to unwanted social interactions with outsiders (Vinjamuri 2015), and how they overcome their own internalised notions that gay men cannot or should not be fathers (Brown et al. 2009; Silverstein et al. 2002). In a small-scale quantitative study for the Netherlands, Bos (2010) showed that although gay fathers did not differ from fathers in different-sex relationships when it came to emotional involvement or parental concern, the former scored higher on parental stress and reported feeling less competent in their childrearing role than the latter. These higher levels of parental stress were related to feelings of rejection, and to the sense that they needed to defend their identity as a gay father. Such findings indicate that minority stress, or heterosexist strain (Silverstein et al. 2002), can spill over into family life. In a qualitative study conducted in the US, Carroll (2018b) highlighted the diversity within the community of gay fathers. She showed that certain groups, such as fathers of colour, single fathers, and fathers who have children from previous heterosexual relationships, were more marginalised in the community, and that these groups developed strategies and resilience in response to these challenges.

Lesbian and gay parents frequently report having to deal not only with violating hegemonic notions of masculinity and femininity, but with health-care professionals trying to fit them 'into a regular mold' designed for different-sex couples (for example, Rozental and Malmquist 2015, p. 136). Belonging and being recognised is associated with orientating through (social) life without friction (Ahmed 2006). Research on same-sex parent families has repeatedly shown that these families are aware of how, when, and where they differ from other families, and diverge from the normative family ideal.

4. CONCLUDING DISCUSSION

In 1997, Sarah Oerton claimed that the diversity of arrangements in gay and lesbian households had failed to remodel and sharpen traditional theories of the division of housework. Two decades later, a growing and rich body of literature – much of which is grounded in empirical research – has improved the theoretical field. However, one question remains: *Has this research influenced the larger family sociological debate, and the perspectives and theories in which it is grounded?*

First, we conclude that research on same-sex couples has indeed expanded the family sociological field, calling into question some of the theories that have long guided the field. One perspective that has been challenged is specialisation theory (Becker 1985, 1991). According to this perspective, family utility is maximised when the division of paid work and housework and care is unequally divided, so that each partner specialises in the work in which they are most proficient. Although the power and the resources partners can draw on in negotiations varies in most couples, research has shown that compared with different-sex couples, same-sex couples are, on average, more equal in terms of income and relative resources, and are more capable of negotiating an egalitarian division of paid/unpaid work and care (e.g., Aldén et al. 2015; Evertsson and Boye 2018; Jaspers and Verbakel 2013). There is also evidence that although same-sex couples are not ‘genderless’ (Biblarz and Savci 2010; Lev 2008), they are more ‘gender-free’ than different-sex couples (Dunne 1998; Evertsson and Boye 2018; Goldberg 2013). The associations between mothers and housework and childcare on the one hand, and between fathers and paid employment on the other, are strong. Thus, same-sex couples enact their relationships within a larger heteronormative context that has historically assigned a gendered valence to various tasks. This has consequences that cannot be overlooked (Goldberg 2013, p. 87).

As we have shown in this chapter, most research on same-sex couples and parents has acknowledged and drawn on research from the larger family sociological field; a theoretical tradition that seeks to explain the division of work and care in heterosexual couples. Studies on same-sex couples have enriched the field. Research on gay and lesbian families contributes to wider interpretations of families by offering additional insights into how norms and expectations are construed and negotiated in the home, the labour market, and society as a whole (Barrett 2015; Carroll 2018a; Rozental and Malmquist 2015). Nonetheless, research on same-sex couples is rarely cited in research on the division of work and care among different-sex couples and families, even though the former raises questions about the dominant theories that are often used and referenced uncritically in mainstream family sociology. It is our hope that, in the future, the two subfields will be better integrated. Traditional family sociology – and particularly research on normative, heterosexual families – should acknowledge the important findings and theoretical challenges that research on same-sex couples and families have produced.

Finally, we consider the question of to what extent new theories and perspectives have been developed. Our conclusion here is not too far from that of Oerton (1997). Even if research on same-sex couples and parents has called into question theoretical assumptions based on different-sex households, it has not resulted in the development of new theoretical frameworks within the broader field of family sociology. This may be in part because the crucial mechanisms that produce the different patterns of work and care observed among same-sex couples and different-sex couples have not yet been identified. To uncover these mechanisms, a combination of research designs and methods will be needed. One of the more promising approaches is to combine longitudinal, qualitative interviews with quantitative, longitudinal studies of couples. Whereas longitudinal, in-depth interviews provide researchers with insight into the rationales and motives that drive people’s decisions, choices, and behaviours as they happen (instead of retrospectively); quantitative research shows the bigger picture, is generalisable, and enables researchers to test theories grounded in qualitative findings.

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NOTES

1. LGBTQI is short for lesbian, gay, bisexual, transgender, queer, and intersex.
2. Heteronormativity is the notion that heterosexuality is privileged and constructed, rather than neutral and natural (Jackson 2006; Roseneil et al. 2013). As a concept, heteronormativity was first presented and used by Warner (1993), and has since been influential in various fields, not least in queer theory (Roseneil et al. 2013).
3. Second-parent (or co-parent) adoption is a legal procedure that allows an individual to adopt their partner's biological or adoptive child without terminating the first parent's legal status as a parent (National Center for Lesbian Rights, 2019).
4. An implicit assumption when the relative resource perspective is applied to the division of housework is that people want to minimise the time they spend on housework when it can be replaced by leisure.
5. The terms 'butch' and 'femme' are used to ascribe or acknowledge masculine and feminine identities associated with styles, behaviours, self-perceptions, etc.

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24. ‘Plus ça change’? The gendered legacies of mid-twentieth century conceptualisations of the form and function of the family

Wendy Sigle

1. INTRODUCTION

In his 2004 presidential address, titled ‘Public sociology’, Michael Burawoy described the plight of the typical graduate student who wants to learn ‘more about the possibilities of social change’ as follows:

[S]he confronts a succession of required courses, each with its own abstruse texts to be mastered or abstract techniques to be acquired. After three or four years she is ready to take the qualifying or preliminary examinations in three or four areas, whereupon she embarks on her dissertation. The whole process can take anything from 5 years up. It is as if graduate school is organized to winnow away at the moral commitments that inspired the interest in sociology in the first place. (Burawoy 2005, p. 14)

When I read this, I found myself imagining what it must have been like for a young woman scholar entering the profession in the middle of the twentieth century, not just as the potential public sociologist who attracted Burawoy’s sympathy, but as a woman wanting to understand as well as change the world she inhabited. In their contribution to *The American Sociological Association Centennial History*, ‘The Presence and Absence of Gender in American Sociological Research’, Ferree et al. (2007) provided some idea of what it must have been like for the growing number of women entering American sociology departments in the 1950s and 1960s. Although the organisation of their graduate education was probably less ‘regimented’ than that of the student Burawoy (2005) imagined, the texts they encountered must have been not just abstruse, but demoralising. The conceptual frameworks that these new entrants first had to master as students and then put to use in their own research made women’s experiences invisible or difficult to comprehend. Many of the women wanting to shift the focus away from men’s concerns, or who sought to make sense of women’s experiences, would find that the prevailing conceptual frameworks and orienting assumptions were not up to the task. Moreover, students inspired by a burgeoning feminist movement in the 1960s would have struggled to describe the social problems they wanted to confront in the public sphere with the canonical knowledge and the conceptual toolbox they were expected to use.

Our young student would have soon encountered the functionalist social theories of Talcott Parsons (1951), which naturalised the relegation of women to the separate sphere of the family, where they would perform an essential expressive role. She would be taught that a rigid gendered division of labour – with men as breadwinners and the public face of the family – best suited the needs of the industrial economy, and was necessary for promoting family stability and social order (Budig 2004; Cherlin 2012). Such theories legitimised a conceptual division between the family and other social institutions: the public–private divide.

They also legitimised the implicit assumption that the (ostensibly ungendered) individuals located within those other institutions were male. Drawing on the metaphor of society as a biological organism (Levine 1995), she might learn to see different societies as being at different developmental or evolutionary stages, with the modern Western family representing the final or most advanced stage of development (Thornton 2005). As these theoretical frameworks assumed that a long-term state of equilibrium had been reached in the West, the implication was that the Western nuclear family model would inevitably emerge elsewhere as poorer countries modernised and followed the same developmental trajectory. A young sociology student eager to 'learn more about the possibilities for social change' (Burawoy 2005, p. 14) would instead be taught that any efforts to change the status quo would be wrongheaded and (to use the language of structural-functionalist writers) *dysfunctional*.

She would likely find that while applications of the sex role model that saw gender 'as a socialized role carried by individuals and primarily produced in and by families' (Ferree 2010, p. 420), and which involved treating gender as an individual-level category of analysis, were empirically convenient,¹ they were extremely limited in terms of both what they were able to show and what they were able to explain (Acker 1992). To the extent that gender was produced in the private, separate sphere of the family, it would be difficult to conceptualise or talk about gender oppression as a public social problem.² To achieve recognition that gender oppression was a social problem would, after all, require that gender first be made visible in non-family macro- and meso-social institutions, such as the economy and the firm. Within the family, the sex role model – which relied on the process of socialisation to differentiate sex from gender – would seem to suggest that 'while gender may be achieved, by about age five it was certainly fixed, unvarying and static – much like sex' (West and Zimmerman 1987, p. 126). The functionalist separate sphere framework and the sex role model would be unable to provide compelling explanations for rapid changes in gender relations in the United States, or to offer much guidance or inspiration to scholars committed to bringing about further social change in both the public and the private spheres. Armed only with the sex role model, these scholars were told to accept the reality that changing gender relations would mean having to 'wait for another generation to be socialized differently' (Deutsch 2007, p. 107). This model provided little hope that the current generation of women 'could lead radically different lives from their mothers' (2007, p. 107). The conceptual division of the family from the rest of society also ensured that gender and the family remained a specialist area that was not relevant to core concerns of sociology.³ Making the decision to study women's lives would also mean accepting a place on the margins of the discipline.

In order to succeed in graduate school, our student would first have to excel in courses taught by instructors who, like 'most sociologists at the time considered Western-style industrialisation as the high-water mark of social organization, so too did they consider the Western-style breadwinner–homemaker marriage the high-water mark of family organization' (Cherlin 2012, p. 584). Along with others, I would add to this the *middle-class, white*, Western-style breadwinner–homemaker model against which African-American families and working-class families were compared and found deficient (Mann et al. 1997). I agree with Andrew Cherlin (2012, p. 584) that '[i]t is perhaps too much to expect that a scholar steeped in functionalism and modernisation theory would have made the intellectual leap to imagining the twenty-first century family'. At the same time, I wonder what it must have been like to have been taught by someone who, like William Goode, 'clearly saw the contradictions of the breadwinner–homemaker family [but] failed to grasp their implications for social change'

(2012, p. 584). Our imaginary student would first have to succeed in a system that required her to be able to demonstrate a good understanding of conceptual frameworks that depicted families with working mothers – the kinds of families that our student may have started to aspire to herself – as dysfunctional, and the status quo as (globally) inevitable.⁴ Only then would it be possible for our student to challenge that thinking with an authoritative voice, and in a way that might stand a chance of getting past the gatekeepers of the discipline. At least initially, critical sociology would have offered our student an equally uncomfortable home:

Leftist thinking often relied on the socialist orthodoxy that working class women were best served by raising men's wages to a 'family wage' so that they could 'stay home' and 'not work' ... Gender issues were addressed by explaining class; the status of women was seen as a 'residual category' that would be resolved with the alleviation of class domination. (Ferree et al 2007, pp. 458–9)

To continue to borrow from Burawoy (2005), it is as if the entire sociological canon was organised to winnow away at the personal and political commitments that might have inspired a young scholar to study sociology in the first place. Taken together, our imaginary student – and myriad others like her – might be forgiven for deciding to look elsewhere for theoretical and political inspiration.

We owe a great debt to those early scholars who persevered, and who, as insider-outsiders, eventually obtained positions that allowed them to use their standpoint to (more or less) effectively challenge the taken-for-granted assumptions of the discipline. These women and their male allies showed why it was necessary to rework the way sociologists conceptualised social institutions and the gendered social actors that inhabit them.

While the contributions to knowledge that feminist sociologists produced are valuable in their own right, their experiences and their process of critical engagement provides a concrete illustration of the claims of feminist empiricists who advocate for 'strong objectivity' as a standard of science: the inclusion of researchers from a different social location contributed to the identification of the biases and exclusions in theory (Harding 1991; Intemann 2010). Confronted with profoundly unsatisfactory theories and concepts, feminist sociologists and gender scholars engaged in 'a multifaceted critique ... including the social theories, methodologies, and epistemological assumptions' of mainstream social science (Orloff 1993, p. 318). Ferree et al. (2007) described in some detail the structural model of gender⁵ that came out of feminists' critique and revision of sociological theory. The structural model that conceptualises 'gender in a ... multilevel and dynamic way' (Ferree 2010, p. 425), and that sees gender power exercised and institutionalised through interactions at multiple sites, requires a very different approach to studying families and other social institutions (Ferree 1990, 2010). The structural model of gender 'treats institutions such as families, states, and markets as inter-connected sites rather than separate spheres or even discrete systems' (Ferree 2010, p. 425). In stark contrast to structural-functional and modernisation theories, the structural model of gender posits that there will be variation and change, rather than convergence and stability; and thus soundly rejects ahistorical, uncontextualised accounts of social patterns and social change. Ferree et al. (2007, p. 466) argued that differences between this model and the early sex role model of gender 'are profound enough to warrant the term *paradigm change*'. Despite the decline of functionalism in sociology making way for new theoretical perspectives to gain a toehold, the long-anticipated second stage of the paradigm shift – 'the acceptance of ... transformations [in orienting assumptions and conceptual frameworks] by others in the field' (Stacey and Thorne 1985, p. 302) – did not follow. The 'feminist revolution' in sociology – first predicted in the

1970s – has yet to emerge. Describing feminist scholarship as having ‘had a dramatic impact on most substantive fields of sociology’, Burawoy (2005, p. 6) also conceded that it was still ‘not quite let into the canon’. Six years after Burawoy’s observation, Ferree (2010) used the glass half-empty/glass half-full metaphor to describe the influence of feminist scholarship on family studies in the previous decade. I am not confident that a similar assessment from the perspective of 2020 would indicate that much has changed.⁶

The limitations of early theoretical approaches and the stalled feminist revolution have had important implications for how family research has been carried out in the decades since. The legacy of structural-functionalism and modernisation theory can be detected in the persistent conceptual division of the (public) political economy from the (private) family. It can also be seen in theories that assume movement towards institutional equilibrium, with different societies expected to go through similar stages of development (Cherlin 2012; Zaidi and Morgan 2017). As feminist scholars have long acknowledged (see, for example, Budig 2004), the legacy of functionalist assumptions has clearly had an enduring influence on how changes in women’s public and private lives have been interpreted in both academic and political circles. The same theoretical legacies may have influenced how researchers have approached the study of men in families. Was it plausible to expect to see variations in men’s family behaviours; and, if so, were those variations going to be relevant or interesting? Implicitly, I think the answer to those two questions was often ‘no’. In what follows, I will examine two areas of research in which the consideration of changes in women’s lives has been a prominent motivation for the analysis. In both areas, men’s behaviour appears to have been taken for granted. I ask whether, how, and with what effect a more careful consideration of men in families entered (or might have entered) the analysis as well.

2. THE NEW FACE OF FUNCTIONALISM: SPECIALISATION AND TRADE

Although historical accounts of sociological theory often report that structural-functionalism had been put to rest by the 1970s, in the decades that followed, functionalist logics and the sex role model continued to inform the way family theories were taught (Mann et al. 1997), and the way families were studied empirically at the micro level in sociology (Smith 1993; Budig 2004) and demography (Watkins 1993; Presser 1997). When the family was conceptualised as a functional separate sphere in which gender as an individual characteristic – a sex role – was produced, family sociology was a niche area; an ‘intellectual backwater’ (Cherlin 2012) in which women, but not men, were studied as spouses and parents (see also Goldscheider and Kaufman 1996). The equation of women and the family was ‘nearly absolute’ (Ferree et al. 2007, p. 438), and family sociology was ‘wives’ family sociology’. While women were of little interest to sociologists outside of their role in the family – except as ‘deviants (‘nuts and sluts’)’ (Ferree et al. 2007, p. 439) – men were of little interest to sociologists studying the family, unless and until men failed to fulfil their instrumental role, which (in line with structural-functional models) was largely to do with economic provision. It was only when men were entirely absent from their families that their role as disciplinarians and gendered role models for their children (sons especially) was brought into focus. Functionalist conceptions of the family as a sphere of companionate and consensual relations meant that men’s violence against women in the private sphere was difficult to even conceive. Talcott Parsons,

for example, said virtually nothing about the subject (Mann et al. 1997). Ferree et al. (2007) remarked that although some research on the topic appeared in the *Journal of Marriage and Family* in the 1970s, nothing on domestic violence was published in the ‘big three journals’ of American sociology until 1984.⁷

By the 1970s, functionalist family models in sociology were thoroughly undermined by empirical evidence that their theoretical predictions about family stability (in the United States) and change (elsewhere in the world) were far off the mark (Alway 1995; Wiley 1985). By the beginning of the 1980s, Gary Becker had turned his attention to the family, an institution similarly neglected as a separate – and uninteresting – sphere in the field of economics (Benería 2016). While his book, published in 1981 and titled *A Treatise on the Family*, might be commended for making the case that the family was indeed an important site of production (think, for example, of labour supply models that unproblematically assumed that individuals divided their time between paid work and leisure) and a relevant area of economic inquiry, the New Home Economics he developed – which used neoclassical economic theory to explain and predict and prescribe family behaviours – bore a striking resemblance to functionalist theories in sociology. Where the functionalists in sociology saw social order and sought to predict it, Becker saw market equilibria and sought to explain those. Specifically, chapter 2 of *A Treatise on the Family* revived a functionalist account of the need for a gender division of labour in the family (Budig 2004; Lucas 2007). Becker’s model, however, offered an individual-level explanatory account that differed from earlier functionalist models in sociology, which saw the form and function of the modern Western family as offering the best ‘fit’ to the industrial economy. Borrowing from a simple model of international trade – familiar to any student who has taken an introductory macro-economics course – Becker argued that the ‘gains’ would be greatest when marital partners specialised in paid or unpaid work according to their comparative advantage. While the limitations of Becker’s model did not pass without comment (see, for example, Bergmann 1995 and Oppenheimer 1997), his ‘anchored narrative’ (Van de Kaa 1996) which legitimated the sexist status quo, resonated with many mainstream economists, as well as with scholars in other disciplines such as sociology and demography (Presser 1997; Watkins 1993).

Deflecting accusations of sexism, Becker (1981) argued that specialisation is the most efficient division of labour even if family members are biologically identical. Small initial differences between family members were all that were needed for there to be comparative advantage. If men and women were socialised differently during childhood, this could explain gendered patterns of comparative advantage. Becker’s model of specialisation and trade could be seamlessly integrated into literature reviews and empirical study designs that relied on functionalist understandings of the family, and a sex role understanding of gender. This ease of integration might help explain why Becker’s *A Treatise of the Family* continues to be so highly cited by family scholars in sociology. In 2013, it was 19th on Neal Caren’s list of the most highly cited works in sociology journals. Because the specialisation and trade model has been and remains prominent in sociology, a closer look at how the model has been deployed, evaluated, and tested may shed light on how sociologists think about families – and particularly about men in families.

Typically, the specialisation and trade model is presented as predicting that a rise in employment among women and mothers will undermine the benefits of co-residence and marriage. Consequently, a large number of papers have used cross-sectional and time series analyses to examine whether women’s labour market opportunities are associated with non-marriage

and divorce, and whether men's labour market success stabilises marriage (see, for example, Blau et al. 2000; Hoffman and Duncan 1995; Moffitt 2001; Van der Klaauw 1996). A positive association between women's employment and divorce was often interpreted as being consistent with a decline in the gains from specialisation. In reviews of the literature, some scholars have questioned the robustness of the statistical findings (Oppenheimer 1997). Others have suggested that this association might reflect reverse causality: rather than employment causing divorce, those women who anticipate a divorce might be more inclined to enter paid employment. A different set of critiques have been more theoretical in their focus (Bergmann 1995; Oppenheimer 1997), highlighting other potential benefits of women's employment that might be substantial enough to predominate in some contexts. For example, marriage (or co-residence) allows for the joint consumption of goods, some of which, like housing, might lead to large economic savings. To the extent that at least some consumption is joint, gains from marriage might increase with income, regardless of which partner earns it. Moreover, a strategy in which both partners engage in paid work can reduce risk. If only one partner specialises in paid work and then becomes ill, unemployed, or absent, the couple's earnings from paid work will fall to zero (Moffitt 2000).

Although the specialisation and trade model applies to both paid and unpaid work, most empirical tests and theoretical critiques of the model have focused only on the relationship between women's labour market participation and divorce (an indicator that the gains from marriage are undermined by diversification). The implicit assumption seems to be that men always specialise in paid work. The primary emphasis on variations in women's paid work means that few scholars have set out another testable hypothesis, much less examined it empirically: namely, that men's contributions to unpaid work should, in some instances, destabilise marriage by reducing gains to specialisation (Sigle-Rushton 2010). Moreover, few studies have carefully thought through and properly measured deviations from intra-household specialisation. A one-and-a-half-earner model – in which the man works full time and the woman works part time, but assumes responsibility for the home – is not, strictly speaking, a deviation from specialisation, at least according to the specialisation and trade model that Becker imported from international trade theory. If the family's need for domestic production is met efficiently enough, women could specialise in domestic work and devote any remaining work time to the labour market. Those families would still be described as specialising. Assuming this situation does not result in any status competition between a woman and her husband, it is the sort of arrangement that even Talcott Parsons might have found acceptable in those urban, low-fertility contexts in which a woman's domestic role had 'declined in importance to the point where it scarcely approaches a full-time occupation for a vigorous person' (Parsons 1942, p. 62, cited in Cherlin 2012). Similarly, if the family's need for economic resources is met so efficiently that men have surplus hours of working time, men should, according to the specialisation and trade model, devote any remaining hours to home production. A one-and-a-half-earner or a one-and-a-half homemaker model can be the most efficient allocation of both partners' time. Only when both partners diversify are the putative efficiency gains posited by the specialisation and trade model clearly attenuated. Consequently, an empirical test would ideally use information on both partners' contributions to paid and unpaid work and a modelling strategy that adequately differentiates between specialised and non-specialised gender divisions of labour. Even if we assume that most women engage in home production and most men engage in paid work, we still require information on women's employment and men's home production. However, information on men's household production has rarely

been considered in tests of this model, presumably because it is assumed that men devote little, if any, time to home production. But if that is the case, the rise in women's paid employment should not undermine the gains from marriage. As I argued a few years ago (Sigle-Rushton 2010), the real testable hypothesis of Becker's model is not whether women engage in paid work, but whether men's engagement in unpaid work destabilises marriage when women engage in paid work.

In the case of the specialisation and trade model, inattention to what men do in families has led to some potentially important theoretical blind-spots and misinterpretations. A more structural understanding of gender that focuses on gender relations instead of gender roles would underscore the importance of bringing men more squarely into the domestic frame. However, some scholars have expressed concerns that structural models of gender – especially when applied to topics such as gender divisions of paid and unpaid work – are more often used to demonstrate the intransigence of gender inequality than to identify the ways that gender inequality could be challenged (Deutsch 2007). While I am sympathetic to that concern, it is, perhaps, equally important that a structural understanding of gender underscores the importance of contextual variation (Risman 2011). Findings that support a hypothesis or offer an explanation in one setting cannot be generalised to other settings in which the institutional context (for example, levels of economic insecurity that might make relying on a single earner especially risky) is different. This insight suggests that even when patterns of gender inequality are explained, they cannot and should not be assumed to be natural, universal, or inevitable, as notions of a 'transition' in family demography too often (still) seem to imply (Zaidi and Morgan 2017). This, at least, points to the possibility of change.

3. GENDERED WELFARE REGIME STUDIES: CHALLENGING THE FAMILY AS A SEPARATE SPHERE?

In the last decades of the twentieth century, the break from structural-functionalist thinking about the family was arguably more decisive in social policy scholarship than in family sociology and demography (Watkins 1993; Greenhalgh 1996; Cherlin 2012; Zaidi and Morgan 2017). Notions of convergence were replaced by notions of path dependency that led to different sets of institutional complementarities (see, for example Orloff 1996 and Myles and Quadagno 2002). In the welfare regimes literature, for example, the working mother – when she was eventually made conceptually visible and interesting – was presented as less of a social problem than in the micro-level empirical studies of the family that were discussed in the previous section. Indeed, in the gendered welfare regime literature, the working mother became what Lisa Brush (2002) has described as the 'privileged subject' of feminist social theory. This is at least partially due to the fact that it was feminist scholars – rather than mainstream scholars – who first brought her into focus. The working mother provided an evocative illustration of the problems that emerged when the family was conceptualised as a separate sphere, and when the political economy (e.g., the state and market) was examined without reference to the family:

Working mothers bridge home and work, public and private, and thus transgress the presumptively separate spheres of modern industrial societies. Both at work and home, working mothers are a symbol of challenge and change, lionized by feminists and vilified by conservatives. Working mothers live the spillover of family life into work and politics and are most constrained by the 'time

bind' that results from escalating expectations on the job and little relief from domestic responsibilities. (Brush 2002, pp. 172–3)

Feminist scholars engaged in a multi-fronted critique of Gøsta Esping-Andersen's (1990) *Three Worlds of Welfare Capitalism* by highlighting its lack of attention to institutional support for different family models, as well as its conceptual biases. For example, Jane Lewis (1992) showed that support for male breadwinning – whether it was weak or strong – cut across the three clusters of welfare regimes that Esping-Andersen identified (conservative, social democratic, and liberal). Ann Shola Orloff (1993) highlighted and sought to redress the androcentric biases in the way Esping-Andersen conceptualised the social rights of citizenship. These feminist theoretical interventions were primarily about making visible variations in women's activities, but not in men's behaviour. Although recent studies have documented variations across welfare regimes in men's contributions to core housework and child care from the 1970s onwards (see, for example, Altintas and Sullivan 2017), the idea that differences in men's time availability across welfare regimes (perhaps as a consequence of differences in working time regimes) might lead to variations in their contributions to unpaid work and child care was not an issue that focused the minds of many of the scholars who, in the early 1990s, sought to bring more of a gendered perspective to the welfare regimes literature. Women were assumed to have retained responsibility for the bulk of unpaid work in the home, even as they entered the labour market with greater or less support from the state:

Nowhere in the industrialized West can married women and mothers choose not to engage in caring and domestic labor (unless they are wealthy enough to purchase the services of others). Land and Rose (1985, p. 93) call this situation 'compulsory altruism' for women (Taylor-Gooby 1991, p. 102). The core aspects of the sexual division of labor remain: Women perform most domestic work whether or not they work for pay, while men do very little domestic work. (Orloff 1993, p. 313)

An unintended consequence of the focus on working mothers may have been that while the family was accepted as important for understanding the 'special' case of women workers, the assumption that the unqualified (male) worker could still be studied without bringing the family to the state–economy nexus (the family as a separate sphere theoretically) may have persisted. Throughout much of the 1990s, variations in men's roles in families were assumed to be minimal, and thus not worthy of greater scrutiny in the welfare regimes literature. For example, Sullivan and colleagues (2018, p. 265) have suggested that it was not until the first decade of the twenty-first century that researchers began to study men's and fathers' unpaid work empirically. The assumption that men's experiences in different welfare regimes could be examined without much reference to the institution of family was largely undisrupted, at least until the 'use it or lose it' daddy quotas were first introduced with some success in those countries classified as social democratic welfare regimes (see, for example, Hobson 2002). The level of enthusiasm for such policy innovations in the gendered welfare regime literature – innovations which on their own encouraged men to take on caring responsibilities for a very short period of time – could be read as evidence of how little could be expected of men as carers in their families, and how far removed from Fraser's (1994) *universal caregiver model* things remained, even in those welfare states in which politicians expressed support for such an arrangement (Tunberger and Sigle-Rushton 2011; Rubery 2015). The privileging of the working mother may also have contributed to an overly narrow conceptualisation of gender inequality as being only about gender divisions of paid and unpaid work (Brush 2002;

for a recent example, see Goldscheider et al. 2015) and gender power as being primarily about (economic) bargaining power in the private sphere. As in the structural-functionalist models of the mid-twentieth century, considerations of gender relations remained largely relegated to the institution of the family, and the family was seen as relevant only (or maybe especially) when the special case of women was considered (Ferree et al. 2007). Moreover, studies of why men did or did not take up their parental leave entitlements and cross-national comparisons of men's time use in families were often viewed as relevant to understanding variations in women's paid employment. For example, Sullivan et al. cited a number of cross-national comparative studies that showed that 'women do less housework and men do more housework in countries that have (a) higher levels of full-time employment among women, (b) greater provision of publicly funded child care, (c) relatively short paid maternal leave periods, and (d) more egalitarian gender attitudes' (2018, p. 265). Despite some shift of focus towards men in families, a review of research since 2010 reported that cross-national comparative studies of fathers' involvement with children are still 'rare' (Schoppe-Sullivan and Fagan 2020, p. 176).

Considering how gendered welfare regime research has developed over time – drawing attention to the importance of the family to women's lives, but not to men's – it is, perhaps, not entirely surprising that the Varieties of Capitalism (VoC) model (Hall and Soskice 2001), which emerged after a decade of engagement with and revision of Esping-Andersen's work, replicated his inattention to the family as a (complementary) social institution. As in the literature on gender and welfare regimes, scholars critical of the VoC model focused predominantly on how differences between women's labour market experiences were not well differentiated, particularly within the broad group of co-ordinated market economies (CMEs), which includes such diverse countries as Sweden, Germany, and Japan (Mandel and Shalev 2009; McCall and Orloff 2005). While the implicit assumption that variations in women's labour market patterns were not relevant, and the functionalist explanations that were then offered to explain those differences were soundly critiqued (including the taken-for-granted assumption that discrimination against women workers would be rational for firms operating in CMEs⁸ (Rubery 2009)), the exclusion of the family from the analysis was implicitly assumed to be less problematic in the case of men and fathers.

4. CONCLUDING REMARKS

This chapter took as its starting point that in the middle of the twentieth century, dominant theories in American sociology were inadequate for understanding (or even seeing) gender oppression, or for predicting the profound changes to gender relations and families that were to take place in the coming decades. The legacy of androcentric biases and problematic gendered background assumptions meant that the public–private divide has persisted. Efforts to conceptualise the causes and the consequences of women's entry into the public sphere were often conceptually inadequate and incomplete. Making women visible was extremely important, but it is the working mother who has been the most visible woman of all. This is not without consequences. In 2002, Lisa Brush suggested that in the welfare regimes literature, the privileging of the working mother has led to a narrow, employment-focused conceptualisation of gender equality: the extent to which women can behave like men in the labour market and in politics. She has argued that this perspective has caused important issues like men's violence against women – and issues of men's power and privilege more generally – to fall out of the

picture. Men's contributions to unpaid work and care have received increasing attention in recent years, but their (increased) contributions to domestic work or their take-up of parental leave tend to be viewed as having more of an impact on their partner's life than on their own. Men are still expected to be full-time workers; and this is the 'norm' against which women's (mothers') patterns are judged equal or not. Except in a small (but growing) body of literature on stay-at-home dads (Schoppe-Sullivan and Fagan 2020), it has been more or less taken for granted that most men cannot choose not to engage in paid work. This assumption, I think, may have contributed to the conceptual persistence of the public-private divide in the mainstream comparative welfare state literature. In quantitative studies of family structure and divorce, the working mother has also figured prominently. But in this literature, she has been the target of blame as much as she has been the object of study. The result has been less a thin conception of gender than the deployment of a gendered caricature (the selfish and greedy 'bad' mother). What men do or might do in families has (often implicitly) been assumed to vary too little to merit any real attention when this model has been deployed. Changing the subject in this area of research has the potential to produce better empirical evidence of family dynamics, and a more theoretically coherent account of family variation and change. But ultimately, such work will, I expect, illustrate the need for a more decisive and definitive exorcism of the ghosts of family sociology's theoretical past.

NOTES

1. Empirically convenient because 'gender' could be operationalised with a sex dummy variable.
2. Indeed, in their longitudinal content analysis of textbooks in family sociology, Mann et al. (1997) noted that theories of gender oppression were largely absent until the late 1970s.
3. It was not just gender that was compartmentalised. Frameworks and approaches that studied gender at the individual level in the family, class in the market and the economy and race as a national issue 'distorted analyses of these inequalities and institutions' (Ferree 2010, p. 425). The different levels of analysis typically associated with each of these inequalities also made it difficult in the years that followed to incorporate intersectionality into study designs in sociological research (Choo and Ferree 2010).
4. As less developed countries moved through the stages of development or adapted their institutions so that they provided the best 'fit' for industrial society, Goode and theorists who more explicitly drew on a biological metaphor (societies 'progress' through the same developmental stages) (Cherlin 2012) or an evolutionary metaphor predicted convergence to the Western nuclear family model (for an excellent, concise description, see Thornton 2001, p. 450).
5. Sometimes referred to as the gender relations model or gender as institution (Ferree et al. 2007).
6. In their contribution to the 2020 Decade in Review, Few-Demo and Allen (2020) provide examples of studies that have used gender as a structure framework (using a critical and intersectional perspective), but they do not provide an assessment of whether the number of studies using this conceptualisation of gender has become more widespread.
7. I am not aware of any studies that have surveyed the coverage of domestic violence in the top European journals over the same period.
8. The logic is that firms in CMEs tend to make high levels of firm-specific investments in their employees. Such firms see women as a risky or less profitable investment because they are more likely than men to take career breaks for childbearing.

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PART VIII

FAMILY AND SOCIETY

25. Poverty and the family in Europe

Jonathan Bradshaw and Rense Nieuwenhuis

1. INTRODUCTION

Poverty has a severe impact on families, and particularly on children who grow up in poor families. This is undeniably the case even in rich societies. Compared with higher-income families, poor families are less able to financially invest in their children, which is known to impair children's cognitive development and social relations; and they experience more stress, which has been linked to parenting styles that are less sensitive to the needs of children (Van Lancker and Vinck 2019). Income poverty and material deprivation explain a large share of the differences between children who grow up in single-parent and two-parent families, with the former group having lower levels of emotional well-being (Treanor 2018) and school performance (De Lange and Dronkers 2018).

The objective of this chapter is to explore family poverty and how it is mitigated by social policy in European countries. It examines the poverty risks of families in Europe, with an emphasis on families with dependent children, as these families tend to be at greater risk of poverty than others because they have more members to maintain with a given income. Single people and childless couples mainly have themselves to support financially, although single adults have increasingly been recognised as a group who are at risk of poverty as well. The risk of poverty for multi-family households can also be high, especially if they include dependent children and retired relatives. However, in such arrangements, income from pensions and earnings may contribute to the households' living standards (Verbist et al. 2020). The risk of poverty is elevated if there is only one parent in the household, which is an increasingly common family type in European countries (Chzhen and Bradshaw 2012; Nieuwenhuis and Maldonado 2018a); or if only one parent in a couple is an earner, usually because the other parent is caring for children.

In light of these poverty risks, European societies have developed social policies to help families with children combine work and childrearing. To examine whether and, if so, how these policies are effective, the following sections of this chapter outline the principles that underlie the various definitions of 'poverty' commonly used in the European Union (EU), present the three main types of theories of what causes poverty, and describe a number of anti-poverty policies that have been implemented in Europe. In the discussion on policies, a distinction is made between 'active' and 'passive' social policy approaches. One of the 'active' objectives of providing childcare or childcare subsidies, maternity benefits, and parental leave arrangements is to encourage and enable parents to be earners. Parents who do not participate in the labour market because they are unemployed, sick, or disabled may be covered by passive social protection (social insurance or social assistance) schemes. To help parents manage the extra costs associated with raising children, all European countries have developed child benefit packages that include transfers to parents who have children, regardless of whether they are employed (Bradshaw 2018; Van Mechelen and Bradshaw 2013).

2. FAMILY POVERTY

2.1 Measures

There is no single, perfect measure of family poverty. Broadly defined, poverty can be understood as lacking the resources considered necessary to maintain an adequate standard of living, or to participate in society (e.g., Smeeding 2017). This general concept can be operationalised in myriad ways that highlight different aspects of poverty, and that complement each other.

When designing a measure of poverty, the analyst has to make a number of decisions. While this list is not intended to be exhaustive, we outline here seven important decisions that an analyst would typically have to make in operationalising such a measure. In the next section, we present in more detail three of the most important definitions that are used in the EU.

First, *poverty of what* needs to be defined. Poverty can, for instance, be measured based on income before or after taxes, benefits, wealth or savings, expenditures, deprivation of capabilities, or inability to participate in society (Cowell 2011; Sen 1993).

Second, the *reference period* during which the resource is measured needs to be defined. For example, when measuring income poverty, annual income is typically considered, as this metric is in line with income tax reference periods. However, such a poverty measure would not pick up on problems related to short-term income losses or seasonal fluctuations in income.

Third, the *unit* of analysis needs to be selected. If, for instance, income poverty is being measured, the analyst must decide whether the income being considered is that of individuals, of all of the household members combined, or, in the case of multi-family households, of separate families. In households, incomes are typically equivalised for household size to account for differences in need and economies of scale (Atkinson et al. 1995; Daley et al. 2020).

Next, assumptions must be made about *how resources are shared* within the unit. When the unit of analysis is the individual, it is typically assumed that there is no sharing of resources; whereas when the unit of analysis is the household, it is typically assumed that the household's resources are shared. When analysing income poverty, differences in need between households as well as economies of scale are accounted for by dividing the household income by the equivalent number of household members. It is also possible to assume that there is a partial sharing of resources. If it is assumed that there is a full sharing of resources, all household/family members are considered to have the same poverty status, even though it has been documented that not all household members have equal access to and control over household resources, with women often being at a disadvantage (Bennett 2013). A rarely recognised consequence of the assumption that there is an equal sharing of resources is that men and women living in the same household are assigned the same poverty status. When that is the case, researchers may not be able to observe gender gaps in poverty driven by gender inequality within heterosexual couples, but only those driven by gender differences in poverty among single-adult households (Doctrinal and Nieuwenhuis 2019).

Fifth, the *poverty line*, or the threshold below which people are considered to be poor, needs to be defined. This line can be set in absolute terms, or in relative terms (e.g., an income below a certain percentage of median income in a country at a specific year). An absolute poverty line is often based on the value of the goods that are considered necessary for a minimum standard of living. An 'absolute' poverty line is set and kept constant across contexts (except for corrections for inflation). However, even an 'absolute' poverty line is inherently relative in the sense that what is considered necessary for a minimum standard of living is determined in relation to

how other people live (Townsend 2010). A relative poverty line, by contrast, is continuously updated across contexts and over time, and is relative to the incomes (or other resources) of others in the same society. Absolute and relative poverty lines can also be combined. For instance, in the ‘weakly relative’ poverty line that is used for measuring poverty around the world (Atkinson 2019), the relative poverty line is set at 50 per cent of median income, with an absolute minimum of \$1.90 (in international dollars).

Sixth, the analyst must decide how to *calibrate* the poverty measure by selecting which weights to apply to those below the poverty line (Amiel and Cowell 1999). The headcount poverty rate counts all individuals below the poverty line equally. An alternative approach that picks up on differences in poverty intensity is to weight individuals based on their distance from the poverty line, which results in a measure called the poverty gap.

Finally, distinctions can be made between *unidimensional* and *multidimensional poverty* indicators. An example of the former is income poverty, which is based on just one resource; whereas an example of the latter is the global multidimensional poverty index, which combines 10 indicators in the areas of health, education, and standard of living (Alkire et al. 2015).

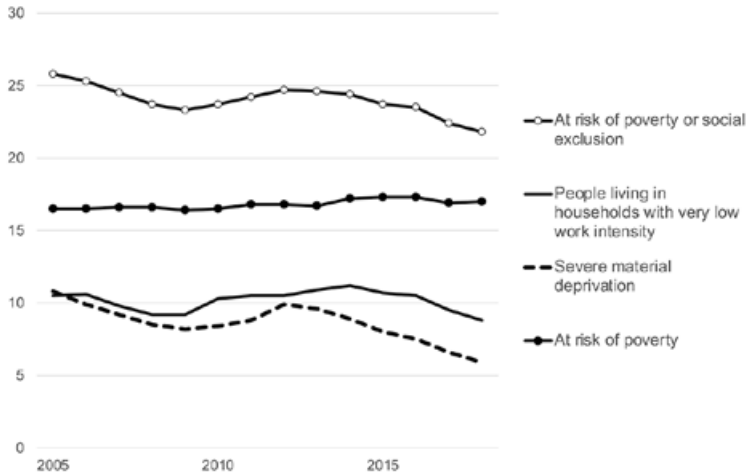
2.2 Poverty Measures in a European Perspective

In the EU (and in other European countries), a number of conventions have been established that we will discuss here in more detail. The *at risk of poverty or social exclusion* (AROPE) indicator was the headline indicator for the EU 2020 Strategy target of lifting at least 20 million people out of the risk of poverty or social exclusion between 2008 and 2020. The indicator is used to monitor progress towards the United Nations Sustainable Development Goal 1, and is currently a main indicator in the Social Scoreboard for the European Pillar of Social Rights. An individual is considered at risk of poverty or social exclusion if s/he is either at risk of poverty, severely materially deprived, or living in a household with a very low work intensity. These three constituting indicators are also used as separate indicators of living conditions and poverty.

A person is considered *at risk of poverty* (AROP) if s/he is living in a household with an equivalised, disposable annual household income below 60 per cent of the national median household income. Within the framework of the discussion above, the AROP is a unidimensional measure of relative income poverty, as the poverty line is set at different levels in each country, and varies over time as median household incomes increase or decrease. While there are a number of problems associated with using this measure (for a discussion, see Bradshaw and Movshuk 2019), it can provide some insights into country differences in poverty risks. Individuals are considered *severely materially deprived* if they cannot afford four or more of the following items: to pay their rent, mortgage, or utility bills; to keep their home adequately warm; to handle unexpected expenses; to eat meat or protein regularly; to go on holiday; to own a television set; to own a washing machine; to own a car; or to have a telephone. As severe material deprivation is an absolute, multidimensional measure, the same criteria are used throughout the EU. Guio et al. (2017) have proposed an alternative material and social deprivation indicator based on 13 items that are selected using a systematic item-by-item robustness analysis (available only after 2014). Finally, a person is considered to live in a household with *low work intensity* if the working-age household members (ages 18–59, excluding students under age 24) worked less than 20 per cent of their total potential during the previous 12 months. This is a unidimensional, absolute measure of social exclusion.

2.3 Poverty Rates in European Perspective

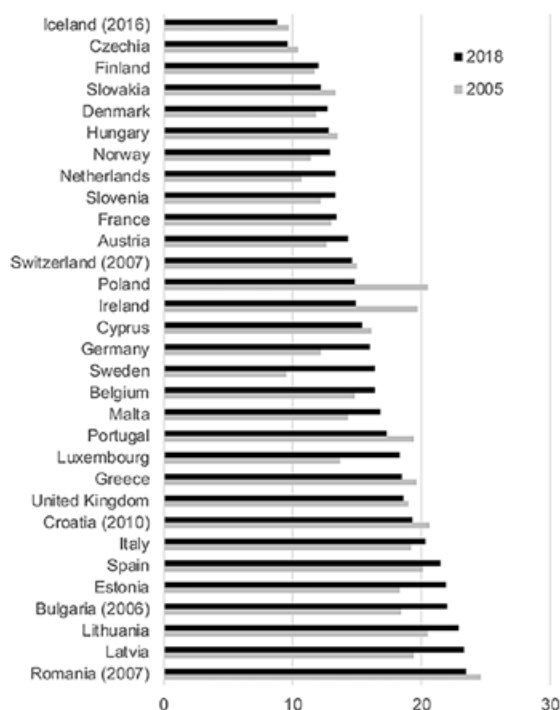
Figure 25.1 presents the trends in AROPE, and the three constituting indicators, in the EU 27 countries from 2005 to 2018. The results for the EU show a clear decline (albeit with a temporary increase around 2012) in AROPE, as well as in indicators of severe material deprivation and living in a household with low work intensity. The results also show, however, that AROP remained stable, or even increased slightly. These findings are perhaps particularly enigmatic given the decline in the numbers of people living in a household with very low work intensity.



Source: Eurostat (2020).

Figure 25.1 European Pillar of Social Rights indicators of people at risk of poverty or social exclusion, 2005–18, EU-27

To further examine the development in AROP, we turn to the country-specific trends in the AROP rate. We focus only on AROP, and not on severe deprivation and work intensity, because AROP had the highest shares of the three constituting indicators, and was the only indicator that was not declining. Figure 25.2 shows that between 2005 and 2018, there were fairly substantial declines (of about five percentage points or more) in AROP in Poland and Ireland, and smaller declines in a number of other countries. However, over the same period, and consistent with the overall trend displayed in Figure 25.1, AROP increased in 18 out of the 31 countries, with Luxembourg and Sweden having particularly large increases. Note, for example, that Sweden had the lowest AROP in 2005 at 9.5 per cent; whereas in 2018, Sweden occupied a middle position, at 16.4 per cent. Thus, Sweden had the largest increase in AROP among the countries studied. Elsewhere, it has been shown that Sweden has recorded the largest increase in economic inequality since the 1980s among the Organisation for Economic Co-operation and Development (OECD) countries (OECD 2015), and that the rise in poverty in Sweden has been concentrated among single parents and single adults without children (Alm et al. 2020).



Source: Eurostat (2020).

Figure 25.2 *At risk of poverty in 2005 and 2018, in European countries*

3. INDIVIDUAL DETERMINANTS OF POVERTY

Theories on the causes of poverty can broadly be categorised as focusing on behavioural, structural, and political factors (Brady 2009; for a similar classification, see Sumner 2016). Behavioural theories are inherently individualistic, and explain poverty by the choices people allegedly make, such as being a single mother or unemployed. Structural theories hold that economic and demographic contexts affect people's behaviour, directly affect poverty, and alter the poverty risks associated with certain behaviours. Political theories explain poverty as resulting from power relations shaping political institutions that (re)distribute resources.

A number of determinants relevant to the poverty of the family follow from these theories. The individual-level determinants we focus on are aspects of family formation and aspects of employment. Two aspects of family formation are particularly relevant to the focus of this handbook. It has already been mentioned that families with children have a greater likelihood of living in poverty, because they need a higher income to have a standard of living similar to that of families without children, and because mothers with dependent children are less likely to be employed (Nieuwenhuis et al. 2012). Indeed, across European countries, it is the case that the more children a family has, the greater their poverty risk (Berthoud and Iacovou 2006; Bradshaw et al. 2006; Lohmann and Crettaz 2018). The second aspect of family formation that is often linked to poverty is single parenthood, most commonly single motherhood. In

the context of the United States, McLanahan's (2004) diverging destinies theory argues that lower-educated mothers have been increasingly overrepresented among single mothers, and that, for this reason, being a single mother has increasingly been associated with having children at a young age, not being employed, and having a low family income. This (mostly) behavioural explanation has intuitive appeal: if having a low level of education is a well-documented determinant of poverty, and having a low level of education is more common among single than married mothers, it may be assumed that this characteristic of single mothers contributes to their poverty. There are, however, a number of limitations to this individualistic explanation of poverty among single parents. First, research has shown that upon closer examination, the educational gradient in single motherhood plays only a small role in their elevated poverty risks (Härkönen 2018; for a similar analysis, see Bernardi and Boertien 2017). Second, this explanation does not (explicitly) account for structural factors that make having a low level of education a much greater risk factor for poverty in some contexts than others, or that mean that being employed does not protect against poverty to the same extent in some contexts as in others (Alm et al. 2020; Brady et al. 2017; Härkönen et al. 2016). Finally, power relations and the political context – ranging from patriarchal institutions (Cooke 2018) to inadequate levels of redistribution (Cantillon et al. 2017, 2018) – are not accounted for. Based on analyses such as these, Nieuwenhuis and Maldonado (2018a) have argued that poverty among single parents can be explained by single parents facing a *triple bind*: in addition to being more likely to have inadequate resources, such as a low level of education, single parents also frequently have inadequate employment, and are exposed to 'inadequate social policy'.

Employment rates among single parents are high (Nieuwenhuis and Maldonado 2018a). Indeed, a recent study found that women living with dependent children *and* a partner are more likely to reduce their employment than women living with a partner and no children or single mothers (Muller et al. 2020). These findings challenge behavioural explanations based on the supposed joblessness of single parents. However, a structural account of (un)employment as a determinant of poverty has pointed to the impact of a rise of precarious employment (Kalleberg 2018), such as working on temporary contracts, having limited employment protections, being forced to work part time or with irregular hours, or having to rely on seasonal work. The distribution of wages has become more dispersed, with wage growth being more limited in the lower deciles, and substantial wage growth in the higher deciles (Bernstein 2016; Björklund and Jäntti 2012). As a result, having a job is not a guarantee against being at risk of poverty. This is acknowledged in the concept of in-work poverty, that refers to people being at risk of poverty despite having a job (Lohmann and Marx 2018).

Naturally, family form and employment clearly intersect as determinants of poverty, which suggests that behavioural and structural theories of poverty are interrelated. There is, for example, evidence that compared with two-parent families, single parents have worse work–life balance and lower job security (Esser and Olsen 2018), and face a much greater risk of poverty even if they have a job, in large part because there is only one earner in the household (Nieuwenhuis and Maldonado 2018b). It has also been shown that the number of earners in different household types has wider implications. This finding is best illustrated by looking at the rapid rise in poverty observed in Sweden (see Figure 25.2). According to recent research, this trend was attributable in part to reduced access to and reduced levels of unemployment insurance benefits, but the level of social protection only mattered for those families who did not have an additional earner in the household (Alm et al. 2020). In other words, households or families who could compensate for a loss of income due to unemployment because there

was a second earner in the household typically managed to avoid poverty risks. However, for families who relied on a single earner, the single earner becoming unemployed was associated with a very high risk of poverty. It is worth noting that this association was found for not just for single parents, but for single adults without children. Thus, these family types had very similar poverty trends. These findings have implications beyond Sweden, and suggest that especially in dual-earner societies, single adults without children should be considered a new social risk group for poverty. In addition, these findings indicate that the poverty risks of single parents are related not just to having children or being single per se, but to the poverty risks associated with having only a single income from employment in an increasingly precarious labour market.

4. POLICY AND POVERTY

Although identifying the individualistic determinants of poverty is important for understanding the underlying mechanisms of poverty, in analyses of cross-country differences in poverty rates, behavioural factors tend to be outperformed by structural and political determinants. Thus, this cross-national variation in poverty rates is better explained by structural factors, such as the abovementioned employment conditions; and by political determinants, such as levels of redistribution by the welfare state (Brady 2009; Brady et al. 2017).

4.1 Active Social Policy

Social policy in European countries is increasingly focused on promoting employment to combat poverty. In the context of the EU, this link is made explicit in the targets, strategies, and directives adopted by the European Commission. However, this development can be observed in many other countries as well. In the *social investment paradigm* of the welfare state, the emphasis has shifted away from providing families with social protection in the form of income transfers to ‘repair’ financial adversity, and towards investing in people’s skills and employability to ‘prepare’ them for financial independence in the market economy (Morel et al. 2012). As has been documented in more detail by Neyer in this volume, this is typically done through active social policies, such as employment assistance, direct job creation, and skills training (rather than through social security unemployment benefits); and through the promotion of higher education, parental leave (including for fathers), and early childhood education and care (Bonoli 2013; Hemerijck 2017; Morel et al. 2012).

From a family perspective, it is relevant that these active social policies were introduced in part as a response to changing family relations. As female labour force participation rose and women were better represented in parliaments, countries expanded their expenditures on early childhood education and care (Bonoli and Reber 2010). In recent decades, European policy-makers came to believe that post-war welfare state policies that primarily focused on protecting income were ill-equipped for dealing with so-called ‘new social risks’, including the challenges of reconciling work and family life, single parenthood, the lack of career continuity, precarious employment, and low or obsolete skills (Bonoli 2013; Morel et al. 2012). Nonetheless, these European social policy developments were criticised for perpetuating familism (Daly 2011), and for obscuring and taking for granted the gender inequality in care responsibilities within the household (Saraceno 2015).

From a policy perspective, it is relevant to go back to the trends presented in Figure 25.1. The figure shows that while substantial efforts were made to promote employment, and the share of people living in households with a very low work intensity indeed declined, the trend in relative income poverty (AROP) stayed constant, or even marginally increased. These trends in poverty in Europe have been described as ‘disappointing’ (Jenkins 2020; Vandenbroucke and Vleminckx 2011). Focusing on single mothers, Jaehrling et al. (2015) found that while the introduction of the active social policy approach did increase their employment rates, it failed to reduce their poverty. In a study of the long-term trends in women’s employment, Nieuwenhuis et al. (2020) found that even though the households in which women are working are less likely to be at risk of poverty, the marked rise in female labour force participation that has been observed in many European (and OECD) countries in recent decades has done little to reduce poverty levels. The authors hypothesised that this is because much of the growth in women’s employment has been either in households who have failed to escape poverty (in-work poverty), or in households who were not poor to begin with.

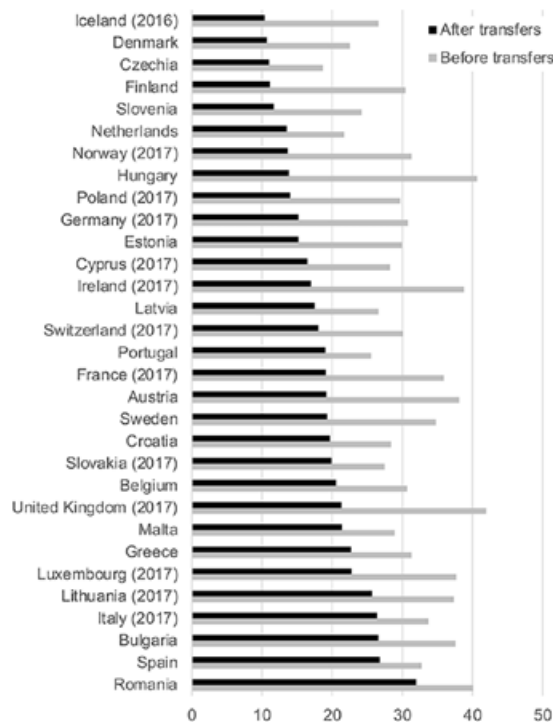
As the benefits of employment can far exceed the a pay cheque, active social policies can have important benefits for workers and families. It has been shown that labour market policy initiatives, such as training programmes, employment subsidies, and direct job creation, are associated with greater transitions out of inactivity and unemployment, and into employment (Fredriksson 2020). There is also evidence that having access to parental leave is associated with reduced poverty among single parents, provided it is paid well (Maldonado and Nieuwenhuis 2015); and that early childhood education and care not only facilitates the inclusion of mothers in the labour market (Pettit and Hook 2009), as it also provides more equal opportunities for children (Gambaro et al. 2015). However, for a number of reasons, employment growth does not guarantee reductions in poverty. Active social policy in the form of public services has a tendency to benefit work-rich households (Cantillon 2011; Ghysels and Van Lancker 2011; Vandenbroucke and Vleminckx 2011). This is because the focus of policy-makers is generally on economic growth rather than social inclusion (Atkinson 2010), and the support for employment through in-work credits often comes at the expense of minimum income protection for those out of work (Cantillon et. al. 2019).

When we take the evidence presented above together (see also Neyer in this volume), we see that active social policies clearly play an important role. But since these policies clearly are not a panacea for poverty, passive social policies in the form of redistribution will continue to be needed.

4.2 Passive Social Policy

To examine the impact of redistribution and income transfers (passive social policy), we focus on the extent to which these policies have been effective in reducing poverty among children and their families. We have chosen to investigate this issue for a number of reasons: first, large families with children are at greater risk of poverty; second, growing up in poverty has severe consequences later in life; and, third, by focusing on children, we can capture a larger set of redistributive policies. We cast a wide net to capture a range of policies that are relevant to the poverty risks of children (and their families), while focusing on policies specifically tailored to children, such as family benefits and child tax credits; and on policies that are aimed at a wider population of families, but that are still of potential relevance to children, such as housing benefits or social assistance.

Every country has a system of transfers designed to help families manage the costs of child-rearing. How effective are these systems at reducing child poverty? This question is explored in Figure 25.3, which shows what the under age 18 AROP indicator would have been if we had excluded all transfers from net income, and what the share was for the same year after including transfers. The bars are ordered by the level of AROP after transfers. We can see that the countries that have low poverty before transfers also tend to have low poverty after transfers, which indicates market income inequality plays an important role in shaping countries' child poverty rates. However, given that there is substantial variation around this pattern, it appears that some welfare states achieve more poverty reduction through redistribution than others. We can, for example, see that Hungary has the most effective transfers, as the country starts with the second-highest (after the United Kingdom) pre-transfer poverty rate, but reduces it by 27 percentage points. We can also observe that Spain, by contrast, starts with a comparatively high child poverty rate before transfers, but reduces it by only six percentage points. In addition, it is apparent that the Nordic countries, Poland, Ireland, and Slovenia have more effective transfers; while the southern European countries, together with Bulgaria and Romania, have less effective transfers.



Note: Pre- and post-transfers. Reporting year 2018 unless stated.
Source: Eurostat (2020).

Figure 25.3 At risk of poverty indicator for children under age 18

Table 25.1 Structure of the child benefit package for working families with children

	Social assistance	Housing benefit	Universal family benefit	Means-tested family benefit ¹	In-work benefit	Child tax benefit ²
Austria		X		X		X
Belgium				X		X
Bulgaria			X			X
Cyprus	X	X	X			
Czech Republic		X	X			X
Denmark	X	X		X		X
Estonia			X			X
Finland	X	X	X		X	
France		X	X	X	X	X
Greece				X		X
Germany		X		X		X
Croatia				X		X
Hungary ²			X			X
Iceland		X		X		³
Ireland		X	X		X	X
Italy				X		X
Lithuania	X		X	X		
Latvia		X				X
Luxembourg	X	X	X			X
Malta		X	X	X	X	X
Netherlands		X	X	X		X
Norway		X	X			X
Poland		X	X	X		X
Portugal				X		X
Romania			X	X		X
Slovenia	X	X		X		X
Slovakia			X		X	
Spain				X		X
Sweden		X	X			
Switzerland			X			X
United Kingdom		X		X ⁴		

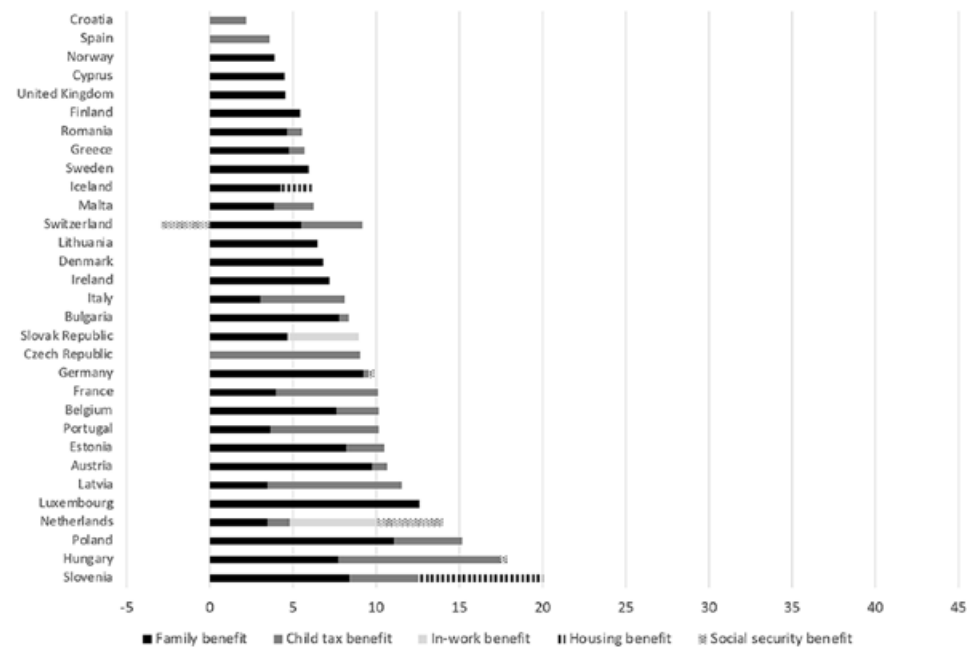
Note: ¹ OECD does not differentiate between means-tested and non means-tested family benefits, but they can be identified by observing whether the amount does or does not vary with earnings. ² Identified by observing whether families with children pay more or less income tax or social security contributions than families without children on the same earnings. In Germany, the Netherlands, and Switzerland families with children also pay lower social security contributions. ³ Families with children in Iceland pay more tax because family benefits are taxable. ⁴ The child benefit was universal, but families with a parent earning over £50,000 per year are no longer eligible to receive it.

Source: Own calculations using output from the OECD tax-benefit web calculator.

Among the questions that arise when considering these results are which types of redistributive policies are the national tax benefit systems comprised of, and which of these systems are more effective than others. Our analysis attempts to answer these questions using the OECD

tax/benefit data. This approach enables us to compare across countries how tax and benefit systems assist ‘model families’. The methodology of ‘model families’ is often used in comparative welfare state research (Nelson et al. 2020), and entails calculating the social rights that a well-defined model or ideal typical family will receive in different countries or time periods. Because the family is kept constant, differences can only be attributed to how each country’s welfare state is set up, rather than to differences in the social backgrounds or compositions of families across countries.

Table 25.1 first lists countries according to which elements their benefit packages for working families with children include. This list effectively shows which policies make it more likely that a couple with two children and an employed parent will have a higher income than a childless couple with the same earnings (the ‘child benefit package’). For all of these elements except universal family benefits, the extra amount parents receive will depend on their earnings. If they receive housing benefits, they will pay less rent; and if they receive the child tax benefit, they may pay less tax or receive a tax rebate that is higher than that of a childless couple. The in-work benefit is a somewhat anomalous classification by OECD. For example, in Ireland, the family income supplement might have been better classified as a means-tested family benefit.



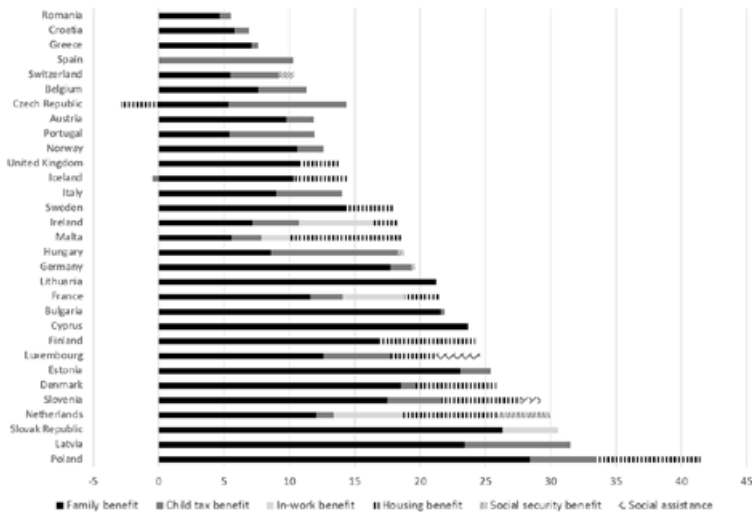
Note: Couple plus two children, both adults employed for 65 per cent of the average wage. Reporting year 2018.
Source: Own calculations using output from the OECD tax-benefit web calculator (OECD 2019).

Figure 25.4 Child benefit package as percentage of average earnings

Six countries may provide some social assistance to low-paid working families. Seventeen countries help offset the cost of rent by providing families with housing benefits that are more

generous if children are present. In addition, 19 countries have universal child benefits, 18 countries have means-tested child benefits, and six countries have both. Five countries have in-work benefits, and 24 countries offer some kind of tax benefit. All countries provide more than one type of benefit, with Denmark, Finland, Luxembourg, Malta, the Netherlands, and Poland offering four types each.

Next, we assess the *level* of each child benefit package by comparing the cash benefits/tax benefits families with children receive with those received by otherwise identical families without children. We focus on families in which the adults are working. First, in Figure 25.4, we show the child benefit package for a couple with two children in which both adults are employed and earn 65 per cent of the average wage. For this family type, Hungary and Slovenia have the most generous packages; and Croatia, Spain, Norway, and Cyprus have the least generous packages. It is difficult to discern any association between the level and the structure. It is possible that those countries that have more than one element in their packages also tend to have more generous benefits. This is, for example, the case in Hungary, the Netherlands, and Slovenia. In Switzerland, the couple with children is presumably paying social security contributions on their family benefits.



Note: Single parent plus two children, earning 65 per cent average wage 2018.

Source: Own calculations using output from the OECD tax-benefit web calculator (OECD 2019).

Figure 25.5 Child benefit package as percentage of average earnings

A different picture emerges in Figure 25.5, which focuses on a single parent with two children earning 65 per cent of the average wage. For this family type, Poland, Latvia, the Slovak Republic, the Netherlands, and Slovenia have the most extensive child benefit packages; while Romania, Croatia, and Greece have the least generous packages. Once again, there is no clear pattern between the structure and the level, other than that the countries with more than one element in their packages tend to have more generous packages. This is, for example, the case for Poland, the Netherlands, and Slovenia. In the Czech Republic, the single parent with

children receives less generous housing benefits than the single person, possibly because his/her family benefits are treated as income in the means test.

Focusing on working families with children allowed us to highlight that even households with working adults receive a considerable amount of their total disposable household income from cash benefits and tax benefits. Single parents tend to receive more benefits, which is largely because a smaller share of their household income comes from earnings. In the comparison between Figures 25.4 and 25.5, which are based on otherwise identical model household types, we can see that this is not because single parents work or earn less, but simply because there is only a single earner in their household.

5. CONCLUSION

Poverty has severe consequences for families, and children can experience long-lasting negative effects from growing up poor. Thus, it is not surprising that European countries (and beyond) attempt to reduce their poverty levels. While such efforts are increasingly in the form of active social policies, as this chapter has demonstrated, passive social policies based on income transfers and redistribution – including for people in employment – remain important.

This chapter provided a detailed description of commonly used measures of poverty, and of the dimensions in which they differ. Behavioural, structural, and political explanations for poverty were outlined. We argued that in explanations of cross-national differences in poverty, individual-level determinants of poverty (such as low education, single parenthood, or the number of earners in the household) are outperformed by contextual determinants (such as policies). These findings underline the relative importance of structural and political theories of poverty.

Although many European governments have engaged in efforts to promote employment, and women's employment has indeed risen in many European countries in recent decades, relative income poverty in Europe has not been declining. The continued prevalence of in-work poverty suggests that employment growth is not a panacea for poverty. The chapter outlined the sometimes complex child benefit packages that European countries provide to families with children. Such redistributive efforts by the state are often successful in reducing the risk of poverty, and, thus, in mitigating its impact. Without these social policies, poverty generated by the market would be much higher than is currently the case in most countries. But it is also true that in many EU countries, the efforts being made by the state are not enough.

Child poverty rates have increased in half of the EU countries since the global recession, and they have risen more than the poverty rates among pensioners (Bradshaw and Chzhen 2015). There is evidence from many countries that this is because of cuts in child benefit packages (Cantillon et al. 2017). Some EU countries are reducing their family benefits and allowing their child poverty rates to rise at a time when most non-EU countries are recognising the importance of social protection in tackling global poverty.

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26. Medically assisted reproduction in developed countries: Overview and societal challenges

Jasmin Passet-Wittig and Martin Bujard

1. INTRODUCTION

Throughout history, people have experienced problems procreating, and have suffered because of it. However, people's options for treating infertility were rather limited before the advent of reproductive medicine. This field of medicine has received considerable public attention since the first baby was born after in-vitro fertilisation (IVF) in the United Kingdom in 1978. Methods of medically assisted reproduction (MAR) such as IVF help people with an unfulfilled desire to have a child. The barriers to procreation can be medical or social. Medical infertility is defined as the inability to establish a pregnancy after at least 12 months of regular, unprotected intercourse (Zegers-Hochschild et al. 2017). Social barriers to procreation include precarious employment, difficulties reconciling work and family life, and casual relationships. Moreover, social barriers to procreation that were previously seen as insurmountable, such as being in a same-sex relationship or having no partner, are becoming less significant because of reproductive medicine. As the scope of (potential) MAR users has expanded, reproductive medicine is no longer seen as simply 'curing' a medical problem, and thus challenges conventional understandings of family.

The use of reproductive medicine is closely intertwined with societal trends in fertility behaviour. The abovementioned social barriers to procreation often result in the postponement of childbearing to higher ages (Billari et al. 2006) and, in some cases, in unintended permanent childlessness (Kreyenfeld and Konietzka 2017). MAR can contribute to the recuperation of childbearing at higher ages (Habbema et al. 2015), and can have a sizeable effect on national birth rates (Geyter et al. 2018).

The use of reproductive medicine is increasing. According to global estimates that exclude China, 1,644 million treatment cycles resulted in 395,000 births in 2011 (Adamson et al. 2018). If China is considered, the number of treatment cycles increases to more than 2 million, and the number of births increases to approximately 500,000. Based on estimates that there were 5 million MAR births between 1978 and 2013 (Faddy et al. 2018) and the extrapolation of ICMART data, we project that the number of MAR births worldwide will surpass 10 million in 2020 or 2021. According to long-term projections, between 157 and 394 million people will owe their lives to treatments such as IVF at the end of the twenty-first century (Faddy et al. 2018). Today, nearly half of all MAR births in the world are in Europe and North America (Adamson et al. 2018). The economic dimension is also relevant: the IVF market generated revenues of \$10.5 billion in 2017, and is expected to grow to \$22.5 billion in 2025, with no signs that market saturation is approaching (Crawford and Ledger 2019).

These dynamics have a number of implications for families and societies. Most importantly, these developments affect the closely intertwined domains of legislation regulating which methods are allowed, access to treatments, and the reimbursement of treatment costs. Legal

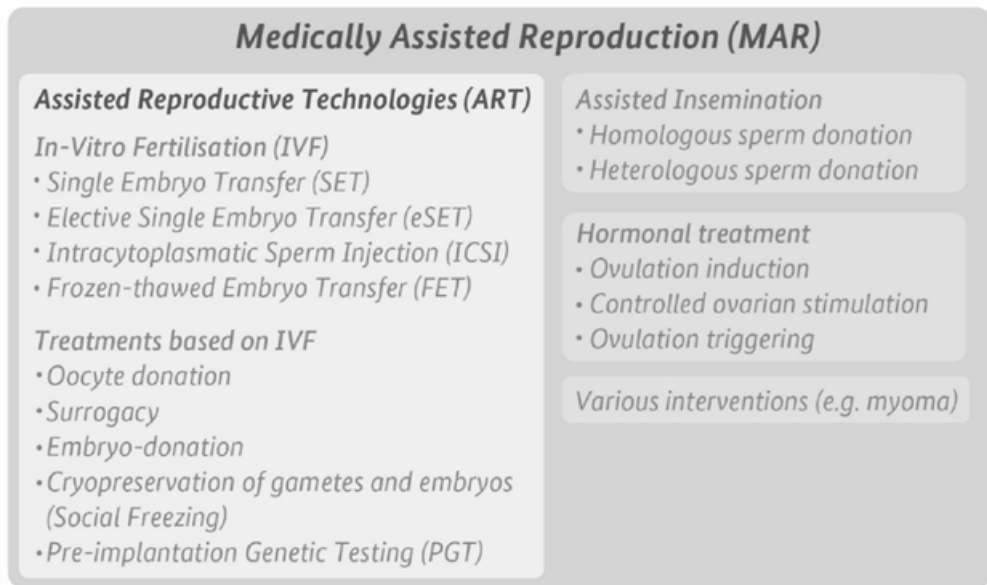
and financial boundaries limit access to treatments in different countries and for different subgroups. For (potential) users, medical developments and changing legal regulations on MAR can have profound effects on their individual and dyadic fertility decisions and life course plans. A thorough discussion of reproductive treatments needs to consider the various ‘costs’ of treatments for users. As well as being financially and physically draining, fertility treatments can be psychologically stressful (Greil 1997; Ying et al. 2016). In addition, on the societal level, the rise of MAR allows novel family forms to emerge. For example, reproduction can now involve more than two parties, such as when a male couple has a child with the help of a surrogate mother. New terms, statistical recording approaches, and laws may be needed to capture these new family forms.

This chapter provides an overview of reproductive medicine in developed countries, with a focus on the implications of MAR for individuals and societies. We start by introducing the relevant medical terminology and most important MAR treatments in Section 2. In Section 3, we discuss how MAR is regulated in developed countries, including which methods are allowed, how the treatment costs are reimbursed, and how these factors are associated with the use of MAR. Next, in Section 4, we shift our perspective to explore the implications of infertility and fertility treatments for MAR users. In Section 5, we examine the health and the development of ‘MAR families’. In Section 6, we discuss how fertility trends and MAR are interrelated. In the final section, we present several conclusions, and discuss avenues for social scientific research in the field of MAR.

2. MEDICAL TERMINOLOGY AND OVERVIEW OF TREATMENTS

The terms assisted reproductive technologies (ART), IVF, and MAR are frequently used to describe modern reproductive medicine, and are occasionally used synonymously. However, these concepts differ fundamentally. To avoid confusion about this terminology, we follow ‘The international glossary on infertility and fertility care’ (Zegers-Hochschild et al. 2017). The term medically assisted reproduction refers to ‘various interventions, procedures, surgeries and technologies to treat different forms of fertility impairment and infertility’ (2017, p. 1796). These include, but are not limited to, ART, a term that encompasses all procedures that include the handling of female and male gametes and embryos outside of the woman’s body (Figure 26.1). ART includes IVF and treatments that are based on or related to IVF. Hormonal treatments and assisted insemination do not fall into this category. However, since these are important treatments that are frequently performed (for insemination, see Geyter et al. 2018), we prefer to use the broader term MAR. The popularity of the term ART has implications for research, as surveys such as the Generation and Gender Survey only consider ART use. Broadening the spectrum of treatments respondents are asked about in surveys could contribute to the development of a more comprehensive measurement of the actual use of reproductive medicine in societies.

In the following, we will give a brief introduction of the most important treatments. IVF involves the extracorporeal fertilisation of oocytes using sperm. The resulting embryos are then implanted in the woman’s womb. If only one embryo is available for transfer, the woman undergoes what is called a single embryo transfer (SET). If more than one embryo is available and one is chosen for transfer, the woman undergoes what is called an elective single embryo



Source: Own representation.

Figure 26.1 Medical terminology: The difference between medically assisted reproduction and assisted reproductive technologies

transfer (eSET). Intracytoplasmatic sperm injection (ICSI) is a variation of IVF in which only a single sperm is injected into the oocyte. While this procedure is generally used to treat male factor infertility, the numbers of procedures performed exceed its prevalence, which is problematic (Adamson et al. 2018). The gametes used in both procedures can be either fresh or frozen. For a fresh cycle, the oocytes are retrieved in an operation after the woman has been treated with hormones. In order to reduce the burden for the woman, the remaining oocytes or embryos are often frozen for use in further treatments (cryopreservation). When a frozen embryo is transferred to a woman's uterus, this is called a frozen-thawed embryo transfer (FET).

Several treatments are based on or related to IVF. Oocyte donation, gestational surrogacy, and embryo donation are third-party reproduction treatments. Oocyte donation is a procedure in which oocytes are retrieved from an egg donor and then used to help other women get pregnant. Women who rely on oocyte donation cannot conceive due to a lack of ovaries by birth, a diminished ovarian reserve, or a genetic disease. Gestational surrogacy typically involves a surrogate who carries the pregnancy for the intended parents. The gestational surrogate is genetically unrelated to the child. If possible, both or at least one of the intended parents provide gametes (oocytes and/or sperm), which in the latter case can be combined with donor gametes. IVF is used to create the embryo, which is then transferred to the surrogate mother. Embryo donation often occurs within IVF treatment, because IVF is often used to create several embryos, only one or two of which are typically implanted, while the rest are frozen and can be donated if they are no longer needed by the intended parents. The cryopreservation of gametes and embryos can also be used to preserve them for a later point in time. This proce-

dures allow women and men to have children after a medical treatment, such as chemotherapy. Recently, the cryopreservation of oocytes for non-medical reasons, which is referred to as ‘social freezing’, has become popular. Social freezing is done primarily to allow a woman to postpone births to higher ages, given that her ovarian reserve and oocyte quality will decline as she grows older. Pre-implantation genetic testing (PGT) is applied to embryos prior to implantation in the woman’s uterus. The procedure is used to identify genetic diseases, but it can also be performed for other purposes, such as sex selection.

There are a number of other treatments that fit within the broad category of MAR. During an assisted insemination, the sperm of the woman’s partner (homologous) or donor sperm (heterologous) are placed into the reproductive tract of a woman during ovulation to initiate a pregnancy. Hormonal MAR treatments include ovulation induction, ovarian stimulation, and ovulation triggering. These procedures are essential components of most ART treatments, but they can also be applied separately to assist women in getting pregnant. Other interventions, such as removing myoma, are also part of the broad field of MAR (Zegers-Hochschild et al. 2017).

3. LEGISLATION, REIMBURSEMENT, AND USAGE OF MEDICALLY ASSISTED REPRODUCTION

Taking into account the legislation regulating which MAR methods are allowed and how treatments are reimbursed is essential for understanding the situations of (potential) MAR users in a given country, and, thus, for understanding the ways in which families are formed with medical assistance. Viewed from the macro level, legislation provides the backdrop for individuals’ or couples’ decision making and actions regarding the use of MAR. In developed countries, the laws regulating which MAR methods are allowed and how they are reimbursed vary greatly. The situation in Europe has been described as ‘legal mosaicism’, which stems from cross-country differences in general moral values regarding ‘the value of life, the welfare of the child, good clinical practice and safety’ (Pennings 2009, p. 16). The legislators of each country have to make their own decisions about MAR, and navigate their way through conflicting interests in the application of these normative and ethical values. The laws and rules in place in a given country reflect what is considered acceptable in that society, and often represent a compromise of sorts. In the following, we focus on how MAR is regulated and reimbursed in highly developed countries, including in the European Union (EU) member states; the English-speaking countries of Australia, New Zealand, the United States, and Canada; and Japan.

3.1 Methods Allowed

In this section, we focus on legislation regulating which MAR methods are allowed. Due to space constraints, we are not able to cover another important aspect of MAR legislation: namely, who is allowed to use specific types of treatment. Governments restrict MAR access for different groups based on their relationship status and sexual orientation. The groups of people to whom such restrictions are often applied include single women, single men, lesbian couples, gay couples, transgender individuals, and intersex individuals. The decision to limit

Table 26.1 *Methods allowed in Europe, English-speaking countries, and Japan*

Country	Oocyte donation	Surrogacy	Pre-implantation genetic testing	Selective foetal reduction	Sex selection
Australia	allowed ^b	allowed ^b	allowed ^b	allowed ^b	
Austria	allowed ^a	allowed ^a	allowed ^a	allowed ^b	allowed ^b
Belgium	allowed ^a	allowed ^a	allowed ^a	allowed ^b	not allowed ^c
Bulgaria	allowed ^a	not allowed ^a	allowed ^a	allowed ^b	allowed ^c
Canada	allowed ^b	allowed ^b	allowed ^b	allowed ^b	not allowed ^c
Croatia	allowed ^a	not allowed ^a	allowed ^a		
Czech Republic	allowed ^a	allowed ^a	allowed ^a	allowed with conditions ^b	not allowed ^c
Denmark	allowed ^a	not allowed ^a	allowed ^a	allowed with conditions ^c	not allowed ^c
Estonia	allowed ^a	not allowed ^a	allowed ^a	not addressed ^c	not allowed ^c
Finland	allowed ^a	not allowed ^a	allowed ^a	allowed ^b	allowed ^b
France	allowed ^a	not allowed ^a	allowed ^a	allowed ^c	not allowed ^c
Germany	not allowed ^a	not allowed ^a	allowed ^a	not allowed ^b	allowed ^c
Greece	allowed ^a	allowed ^a	allowed ^a	allowed with conditions ^b	allowed ^b
Hungary	allowed ^a	not allowed ^a	allowed ^a	allowed with conditions ^b	allowed ^b
Ireland	allowed ^a	not allowed ^a	allowed ^a	not allowed ^b	allowed ^c
Italy	allowed ^a	not allowed ^a	allowed ^a	allowed ^b	not allowed ^c
Japan	allowed ^b	not allowed ^c	allowed ^b	not addressed ^b	practiced ^b
Latvia	allowed ^a	not allowed ^a	allowed ^a	allowed ^b	
Lithuania	allowed ^a	not allowed ^a	allowed ^a	not allowed ^b	
Malta	allowed ^a	not allowed ^a	not allowed ^a		
Netherlands	allowed ^a	allowed ^a	allowed ^a	allowed ^c	allowed ^c
New Zealand	allowed ^b	allowed ^b	allowed ^b	allowed with conditions ^b	allowed ^b
Poland	allowed ^a	not allowed ^a	allowed ^a	allowed with conditions ^b	
Portugal	allowed ^a	not allowed ^a	allowed ^a	allowed with conditions ^b	allowed ^b
Romania	allowed ^a	allowed ^a	allowed ^a	allowed with conditions ^b	allowed ^b
Slovakia	allowed ^a	not allowed ^a	allowed ^a	allowed with conditions ^c	not allowed ^c
Slovenia	allowed ^a	not allowed ^a	allowed ^a	allowed ^b	
Spain	allowed ^a	not allowed ^a	allowed ^a	allowed ^b	allowed ^b
Sweden	allowed ^a	not allowed ^a	allowed ^a	allowed with conditions ^c	not allowed ^c
United Kingdom	allowed ^a	allowed ^a	allowed ^a	allowed ^b	allowed ^b
United States	allowed ^b	allowed ^b	allowed ^b	allowed ^b	allowed ^b

Source: ^a Calhaz-Jorge et al. (2020); ^b IFFS (2019); ^c IFFS (2016).

Note: PGT includes testing for monogenic disorders/chromosome structural rearrangements (PGT-M/SR) and testing for aneuploidies (PGT-A). If at least one type of testing is allowed in a country this country is marked as allowing PGT.

access generally reflects a set of political and societal compromises on the question of which family forms are considered acceptable, and, therefore, who is granted the right to have a child (Warnock 2002). For more information on the current policies on these issues, see IFFS (2019) or Calhaz-Jorge et al. (2020).

Insemination, IVF, ICSI, and FET are considered standard fertility treatment methods that are allowed in all of the countries covered here. The legality of other specific procedures differs between countries. Table 26.1 gives an overview of the legal status of oocyte donation, surrogacy, PGT, and methods for selective foetal reduction (SFR) and for sex selection. The information provided here is based on three sources. For several EU countries, there is up-to-date information reflecting the situation at the end of 2018 (Calhaz-Jorge et al. 2020). If information on a specific EU country is missing, and for the other countries, we use

information from the most recent surveillance report on reproductive policy and practice published by the International Federation of Fertility Societies, which reflects the policies in effect in early 2018 (IFFS 2019); or we go back to the previous report, which reflects the situation in the autumn of 2015 (IFFS 2016).

The use of donated oocytes for ART treatments has increased in recent decades (IFFS 2019). This is in part because in many developed societies, women are delaying motherhood to ages at which their fertility is decreasing. All of the countries in Table 26.1 except Germany allow oocyte donation. One controversial issue regarding oocyte donation is the question of whether donors should receive compensation beyond being reimbursed for their time and expenses (IFFS 2019). Countries further differ in how they handle donor anonymity.

Surrogacy is a very contentious issue. For most gay couples, it is the only feasible way to have a child who is genetically related to one of the partners. Among the important themes that recur in debates over surrogacy are the exploitation of the surrogate mother, the well-being of the child, and how the different interests of the parties involved should be negotiated. In the majority of countries, surrogacy is prohibited. However, all English-speaking countries and some European countries permit surrogacy. Within the group of countries that allow surrogacy, there are important differences in the specific rules surrounding the practice. For example, the laws differ on whether only traditional surrogacy is allowed,¹ whether the surrogate mother can be compensated, and who has access to the treatments.

PGT is now permitted in all countries for which information is available except Malta. From a medical perspective, PGT is an established medical practice (IFFS 2019). However, country-specific regulations on who is permitted to use it and the (medical) conditions for its use differ greatly. Two extreme examples illustrate these differences. First, in Germany, access to PGT is granted only to heterosexual couples with a high risk of severe inherited diseases. Approval by an ethical committee is required for PGT use, and the committee's decision is binding for the doctors at certified PGT centres. Fewer than 350 applications for PGT use were filed with these ethical committees in 2018 (Markmeyer 2019). Second, approximately one-third of all PGT treatments performed in Europe are done in Spain (Geyter et al. 2018). Unlike in Germany, any private IVF clinic in Spain can perform PGT (Pavone and Arias 2012).

Multiple pregnancies can be considered an unintended side effect of many MAR treatments. In some contexts, it has been and still is common practice to transfer more than one embryo to a woman in order to increase the likelihood that she will become pregnant. However, this practice increases considerably the risk of a multiple pregnancy, which can, in turn, pose serious risks for the mother and the children. SFR is a recognised method for reducing the risks and complications of multiple pregnancies. However, it could be considered preferable to reduce the number of embryos transferred by, for example, using eSET. SFR is fully permitted in 14 countries; it is allowed with conditions in 10 countries; and it is not allowed in three European countries (Germany, Ireland, and Lithuania).

Closely related to SFR is the practice of sex selection. With the advances in PGT, the sex of the embryo can be reliably predicted. In some countries, it is now a common practice to use this method for the gender selection of embryos. Other methods used for sex selection are sperm sorting and SFR. Of the 24 countries for which information on sex selection is available, 15 allow and/or practice some kind of sex selection, while nine prohibit it. Together with postnatal excess mortality, prenatal sex selection is a main driver of the skewed sex ratio at birth in Eastern Europe (Guilmoto and Duthé 2013).

3.2 Reimbursement Schemes

The costs of treatments such as IVF and ICSI are considerable, and reimbursements by public authorities can substantially reduce out-of-pocket expenses. The availability of financial resources is an important factor in people's decisions about whether to seek fertility treatment across countries (United States: e.g., Farland et al. 2016; United Kingdom: e.g., Datta et al. 2016; Germany: e.g., Passet-Wittig 2017). Legal restrictions on who is eligible for reimbursement, and, more generally, high out-of-pocket expenses, likely result in social inequalities in who is able to use MAR.

Table 26.2 gives an overview of the reimbursement schemes in the EU member states. Most countries offer only partial coverage in the three main areas of expenses in an ART cycle: medication costs, doctor/medical costs, and laboratory costs. Partial coverage can mean that the patient receives a fixed amount of money or a share of the costs, which typically ranges between 10 and 70 per cent in these countries (Calhaz-Jorge et al. 2020). The variation in the rules is huge. Only Bulgaria, Croatia, and Greece offer full coverage of all treatment-related costs. There is large variation between countries regarding which areas of expenses are covered to which extent. For example Denmark, Estonia, and Hungary offer partial funding of medication costs and complete funding of doctor/medical costs and laboratory costs; while Belgium, the Czech Republic, and Latvia offer complete funding only for one area of expenses. In some countries one or two areas of expenses are not covered at all.

Furthermore, the numbers of cycles that are funded differ between countries (not shown in Table 26.2, see Calhaz-Jorge et al. 2020). In countries such as Germany, Italy, Spain, and Slovakia, a maximum of three cycles are funded per clinical pregnancy. In the Czech Republic, up to four cycles are funded if SET is used in the first two cycles (Calhaz-Jorge et al. 2020). There are several countries where treatment is not equally funded across the country: namely, in Denmark, Estonia, Germany, Italy, Spain, and the United Kingdom. Within these countries, there are regional differences in the rules on reimbursement, and, accordingly, in patients' out-of-pocket expenses. This variation can be hard to understand for those who live in the 'wrong' region.

Most countries have specified eligibility criteria for the funding of fertility treatment. It is common to set a minimum and/or maximum age for receiving funding. The variation in the maximum age for women is huge, ranging from 38 years in Latvia to 49 years in the Czech Republic. Some countries limit access to those with no children or in the case of a couple, have no children together. In Sweden, only one birth is covered irrespective of parity. In Portugal those that already have a MAR child can still get reimbursed for FET. Spain, Sweden, and Romania are the only countries that have set a maximum body mass index for women, above which no funding is provided.

These rules suggest that countries do not base their eligibility criteria on medical arguments alone – or, at least, they have very different interpretations of these arguments. One of the main motivations for restricting access or funding is to keep the costs down. Normative expectations regarding acceptable ways of building a family and acceptable family forms may also affect which individuals are supported in their attempts to have a child.

Table 26.2 *Funding schemes for European Union countries*

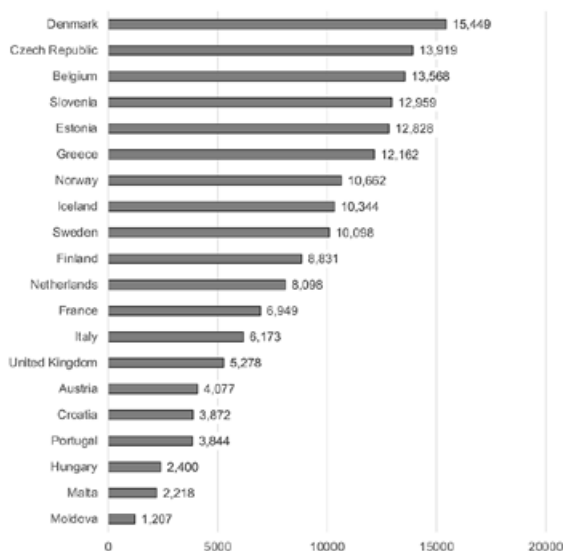
Country	Complete or partial funding			Funding equally across country	Legal limits for funding	Restrictions on funding
	Medication costs	Doctor/medical costs	Laboratory costs			
Austria ^a	partial	partial	partial	yes	yes	max. age 39 for women and 49 for men
Belgium ^a	partial	partial	complete	yes	yes	max. age for women 42
Bulgaria ^a	complete	complete	complete	yes	yes	max. age for women 43
Croatia ^a	complete	complete	complete	yes	yes	max. age for women 42
Czech Republic ^a	partial	complete	partial	yes	yes	max. age for women 49
Denmark ^a	partial	complete	complete	no	yes	max. age for women 40; only women or couples with no own children
Estonia ^a	partial	complete	complete	no	yes	max. age for women 40
Finland ^a	partial	partial	partial	yes	yes	max. age for women 40–45 and for men 60 (not in law but in practice)
France ^a	n/a	n/a	n/a	yes	yes	max. age for women 43
Germany ^a	partial	partial	partial	no	yes	max. age for women 39 and for men 49
Greece ^a	complete	complete	complete	yes	no	
Hungary ^a	partial	complete	complete	yes	yes	max. age for women 45
Ireland ^a	partial	no coverage	no coverage			
Italy ^a	partial	partial	partial	no	yes	max. age for women 46
Latvia ^a	complete	partial	n/a	yes	yes	max. age for women 38
Lithuania ^a	partial	partial	partial	yes	yes	max. age for women 42
Malta ^a	no coverage	100% in public centres; 0% in private centres	100% in public centres; 0% in private centres	yes	yes	max. age for women 48; only childless women
Netherlands ^a	partial	partial	partial	yes	yes	max. age for women 42
Poland ^a	partial	no coverage	no coverage	yes	yes	max. age for women 40
Portugal ^a	partial	100% in public centres; 0% in private centres	100% in public centres; 0% in private centres	yes	yes	max. age for women 40 and for men 60
Romania ^a	partial	partial	partial	yes	yes	max. age for women 40; only childless; max. BMI 30
Slovakia ^a	partial	partial	partial	yes	no	
Slovenia ^a	n/a	n/a	n/a	yes	yes	max. age for women 42
Spain ^{a, b}	partial	partial	n/a	no	yes	max. age for women 40 and for men 55; BMI 35; only couples with no children together
Sweden ^a	partial	partial	complete	yes	yes	max age for women 39 and for men 55; only one child will be publicly funded; only child; max. BMI (value n/a)
United Kingdom ^{b, c}	partial	partial	partial	no	yes	max. age for women 39–42; 'postcode lottery'

Note: BMI = body mass index

Source: ^a Calhaz-Jorge et al. (2020); ^b Boundy (2019); ^c Human Fertilisation and Embryology Authority (2020).

3.3 Usage

As with legislation and reimbursement schemes, there are large differences between European countries in the numbers of ART treatments performed. We report information on the number of treatment cycles per million women of reproductive age, which is available for 20 European countries with complete reporting of all clinics to the national register in 2014, 2013, or 2012 (see Figure 26.2). ART cycles refer to cycles of IVF, ICSI, frozen embryo replacement,



Note: ART cycles refer to IVF, ICSI, frozen embryo replacement, oocyte donation, in-vitro maturation, frozen oocyte replacement, and PGT combined.

Source: Values for Malta, Portugal, the United Kingdom, Italy, Netherlands, Finland, Iceland, Norway, Greece, Estonia, Slovenia, Belgium, the Czech Republic, and Denmark are from 2014 (Geyter et al. 2018); values for Moldova and France are from 2013 (Calhaz-Jorge et al. 2017); values for Hungary, Croatia, Austria, and Sweden are from 2012 (Calhaz-Jorge et al. 2016). Own representation.

Figure 26.2 Number of treatment cycles per million females of reproductive age (15–45 years) in European countries

oocyte donation, in-vitro maturation, frozen oocyte replacement, and PGT. The variation in the number of treatment cycles per million women among the countries in our sample is huge, ranging from 1,207 in Moldova to 15,449 in Denmark. It is noticeable that among the top 10 countries are five Scandinavian countries (Denmark, Norway, Iceland, Sweden, and Finland) and three Eastern European countries (Czech Republic, Slovenia, and Estonia). Intrauterine insemination is recorded less comprehensively than IVF. In 2014, 120,789 inseminations using partner's sperm and 49,163 inseminations with a donor's were recorded based on data from 25 and 21 countries, respectively (of 51 countries).

Usage of MAR depends on many factors, including, but not limited to, legislation and reimbursement schemes (Passet-Wittig and Greil 2021). A study by Präg and Mills (2017) showed

that on the macro level, the factors that are highly predictive of the level of MAR utilisation in a given country include not just its affluence, but the normative acceptance of ART, as well as the size of religious groups and the extent of fertility postponement. Other authors have found that the total fertility rate and ART usage are positively associated (Kocourkova et al. 2014). Moreover, it appears that the generosity of reimbursement schemes is more relevant than the composition and size of the groups who are granted access (Chambers et al. 2012; Präg and Mills 2017). Präg and Mills argued that this is because the treatments are quite costly for everyone, which creates serious barriers to access for almost everyone in need of treatments.

If prospective parents need or want a procedure that is not available to them in their country – e.g., because the treatment is prohibited or access is restricted, it is too expensive, or there are long waiting times to receive it – they might consider travelling to another country for treatment (Ferraretti et al. 2010). Various labels exist for this phenomenon, including cross-border reproductive care or travel, and reproductive or fertility tourism. There are different destinations that prospective parents tend to seek out depending on the type of treatment needed. According to Salama et al. (2018), Belgium and Israel are major global markets for IVF; Spain and the Czech Republic are popular destinations for oocyte and embryo donation; Russia and the United States are common destinations for commercial surrogacy; the United States is often sought out for PGD and sex selection; and Denmark, Belgium, Germany, and the United States are popular destinations for fertility preservation. The people who travel abroad for such treatments represent a highly selective group. Obtaining fertility treatments abroad requires people to have sufficient financial resources to cover substantial out-of-pocket costs for the treatments themselves, as well as travel-related costs. Moreover, prospective parents need to be able to manage the ‘logistics’ of cross-border reproductive care.

Experts have pointed out the (medical) risks of reproductive travel (Ferraretti et al. 2010; Pennings 2002). One problem is that standards regarding the quality and the safety of treatments can vary. In the country of destination, the success rate might be lower, the risk of multiple pregnancies may be higher, and MAR users might not receive adequate information and counselling due to language problems.

4. INFERTILITY AND TREATMENT EXPERIENCE

In this section, we aim to provide an overview of the literature on the effects of infertility and fertility treatment on people’s lives. We treat the experience of infertility and the experiences with medical treatment separately, recognising that infertility is not just a medical, but a social phenomenon. Moreover, since not everyone who experiences infertility seeks medical help, and not everyone who uses MAR is medically infertile (e.g., single persons or homosexual couples), these two groups do not overlap completely.

Despite the low birth rates in most European countries, most people want to have children. Thus, when people experience infertility, this central life goal appears to be – and potentially is – unattainable. The impact of infertility on the lives of women and men can be severe, and can affect various life domains (Brkovich and Fisher 2009; Greil 1997; Ying et al. 2015). It has been shown that infertile people experience more stress, depression, anxiety, and lower self-esteem than their fertile counterparts do. Infertility is also associated with social stigma and shame. Thus, individuals’ relationships with their family, friends, and, most importantly, with their partner can be affected by infertility. Some people might keep their fertility problem

a secret from family and friends, or be envious of the pregnancies of siblings or friends. It appears, however, that in most cases, the relationship with the partner is not at risk; i.e., most infertile couples experience conflict, but are able to manage the situation together, and may even come out of it strengthened. Women and men are affected by infertility somewhat differently, with the impact on a woman's life being consistently greater than the impact on a man's life. The reasons for these gender differences are not completely understood (Culley et al. 2013). It has been argued that the effect the couple's infertility has on the man is rather indirect, and is moderated through the effect it has on the female partner. Social expectations regarding parenthood are typically stronger for women than for men. Wischmann and Thorn (2013) observed that the impact of infertility on men is more pronounced in societies that are more traditional, and in which MAR is less accepted.

The effect of infertility on the psychological well-being of an individual or couple depends on whether they actually intend to have a child. Women who are currently trying to have a child experience greater stress than those who are not trying (Greil et al. 2011a). This is important because the medical definition of infertility is not explicit about the question of fertility intent. The non-use of contraception does not necessarily imply that the individual or the couple are explicitly intending to have a child. Thus, those identified as infertile according to the medical definition might experience no adverse effects. Nevertheless, the medical definition has been frequently used to identify infertile people in the general population. It would be advisable to include fertility intent in the medical definition of infertility. However, the group who can be identified using the medical definition might be too narrow. Irrespective of whether an individual has a medical problem, if the person perceives him/herself as having a fertility problem, s/he is experiencing the adverse effects of infertility described above, and is potentially at risk of seeking medical help (Passet-Wittig et al. 2020).

Infertility-related stress has often been investigated in clinical samples; i.e., samples of patients at fertility clinics. In such studies, it is impossible to sort out to what extent the patients' stress is due to the experience of infertility, or of fertility treatment. Moreover, this research tends to be focused on 'typical' prospective parents (i.e., heterosexual couples). There is evidence from longitudinal data that infertile women who receive fertility treatment have higher stress levels than those who do not (Greil et al. 2011b), which indicates that undergoing fertility treatment is distressing. Patients also tend to make psychological adjustments during fertility treatment (Rockliff et al. 2014; Verhaak et al. 2007). This might seem counterintuitive at first glance, because MAR provides hope to people whose chances of natural conception are low or non-existent. Thus, it is important to investigate what makes fertility treatment so burdensome. For women, most treatments involve the intake of hormones following a strict schedule (e.g., stimulation of ovary growth, induction of ovulation) and frequent doctor visits, which usually take place during regular working hours. The considerable amount of time people need to pursue fertility goals with medical help is a somewhat neglected factor (Wu et al. 2013). In-vitro methods involve the collection of eggs from a woman's ovaries – an intervention that involves general anaesthesia – and the transfer of the embryo(s) to the woman's womb. Overall, patients' expectations before and during treatment are high. Waiting for the results is experienced as particularly stressful. MAR users who do not achieve their fertility goals are especially negatively affected. Moreover, as the treatments are costly, the financial pressure on patients can be high.

Like the infertility experience itself, the experience of fertility treatment is gendered (Rockliff et al. 2014; Verhaak et al. 2007; Ying et al. 2016). Compared with men, women

have higher levels of anxiety and depression before and during treatment, and while waiting for the results. A central aspect of reproductive treatments is that it is usually the woman who is treated medically. In most cases, the man's active involvement in treatment is limited to the delivery of sperm for diagnosis or treatment purposes.

5. HEALTH AND DEVELOPMENT OF 'MAR FAMILIES'

The use of MAR implies the disconnection of sex and reproduction. When the genetic parents and the social parents are different, the traditional understanding of what constitutes a family is called into question. Families created by MAR have been emerging as a new category. This new category includes numerous family forms that typically differ along one or more of the following dimensions: (1) genetic relatedness to the parents, (2) number of parents, (3) sex of the parents, and (4) sexual orientation of the parents (Golombok 2015). Treatments such as IVF and insemination can be combined with a surrogacy and with donor materials (semen, oocytes, and embryos) that may or may not be provided anonymously. Users of MAR can be heterosexual couples, lesbian or gay couples, and single women or men. More than two parties might be the parents: for example, a lesbian couple may have a child with a male friend. Treatments might take place in the home country of the intended parents or abroad. All these options add to the complexity of the families created with MAR.

How numerous are these new family forms? There are no numbers or estimates of the relationship status of MAR users in ART register data. Social science surveys could provide such information, but questions about MAR are seldom included in such surveys – or, if they are included, the prevalence of MAR use is found to be so low that the information cannot be interpreted meaningfully. It can be assumed that, globally, heterosexual couples make up the majority of users, as they represent the only group with access in all countries. However, regulations are changing, and there are several countries that no longer block access for same-sex couples and single individuals. Globally, access to treatment for single women and lesbian couples appears to be better accepted than access to treatment for single men and gay couples (IFFS 2019). It needs to be considered, however, that men *de facto* cannot use most treatments themselves, and surrogacy is controversial.

MAR is still an emerging field. Thus, knowledge about the implications of MAR for children and their families, and for societies, remains very limited. There is, however, considerable research on the well-being of children conceived with MAR over their life course. In the research on the children's general health, short- and long-term effects need to be differentiated. It is well established that compared with naturally conceived children, children conceived with MAR are more likely to have adverse birth outcomes, such as lower birth weight, pre-term birth, perinatal death, and admission to postnatal intensive care (Halliday 2007), and a higher prevalence of neurological problems (Ludwig et al. 2006). Interestingly, studies that have compared MAR-conceived singletons and twins with their naturally conceived counterparts have shown that the perinatal outcomes are worse for MAR singletons than for MAR twins (Helmerhorst et al. 2004). The reasons why this might be the case are not clear. The authors of the review pointed out, however, that on no account does this make a multiple pregnancy a desirable outcome. Studies on the long-term health effects of MAR found some evidence of increased risk of cardiovascular and metabolic problems in MAR children (Hart and Norman 2013a). For all of the health problems observed among MAR children, it is not clear whether

the increased risk is related to the treatment itself, to factors associated with the infertility of the mother, or to the adverse birth outcomes mentioned above.

The literature suggests that compared with their naturally conceived counterparts, children conceived with MAR are not more likely to have major mental health problems during childhood and adolescence (Golombok 2015; Hart and Norman 2013b; Wagenaar et al. 2008), and that there are no differences depending on the use of donor conception (Ilioi and Golombok 2015). The latter factor is important, as it could be assumed that a child being told that s/he lacks a genetic link to at least one parent would experience an impact on his/her psychological well-being. In this context, it is noteworthy that adolescents conceived through reproductive donation who knew about their origin did not report having negative feelings about their conception (Zadeh et al. 2018). As Hart and Norman (2013b) pointed out, there is only preliminary evidence of increased risks of clinical depression and attention deficit disorder among MAR children, which warrants further investigation. Importantly, the quality of parent–child relationships does not appear to differ between MAR-conceived children and naturally conceived children. The existing studies that have compared the cognitive functioning and the school performance of IVF and spontaneously conceived children found no significant differences between them (Hart and Norman 2013b; Wagenaar et al. 2008).

Overall, the existing evidence seems reassuring; i.e., it appears that from a medical and a social-psychological perspective, having been conceived through MAR is not harmful for children. It should, however, be noted that it is difficult to identify longer-term effects of MAR because of the sheer number of possible confounders and difficulties in establishing the appropriate control groups. For example, while a study found that IVF-conceived children performed better in school from grade 3 to grade 11 than naturally conceived children (Mains et al. 2010), the authors were not able to control for factors that are known to be relevant for explaining school performance, such as the parents' socio-economic status, education, and age. Moreover, the implications of MAR for children's mental health might not reveal themselves until adolescence or early adulthood, if the information about how they were conceived is not disclosed to them until they are older. The United Kingdom now recommends that parents disclose such information at pre-school ages to secure the child's right to know his/her genetic heritage (Nuffield Council on Bioethics 2013).

Nonetheless, beyond shedding light on the direct effects of assisted reproduction, studies on the various family forms created by MAR do provide new insights into the ways in which families affect children's development and well-being, and, in particular, into the effects of family structure and family processes. In her book on new family forms, Golombok (2015, p. 202) concluded that 'family structure – including the number, gender, sexual orientation and genetic relatedness of parents, as well as their method of conception – does not play a fundamental role in children's psychological adjustment or gender development'. According to Golombok (2015), family structure has a rather indirect effect through its impact on family processes and dynamics, including on the well-being of the parents and the quality of relationships within the family. These family processes could be different in families created with the help of donor materials, and social stigma could also play a role. More research on these issues is needed.

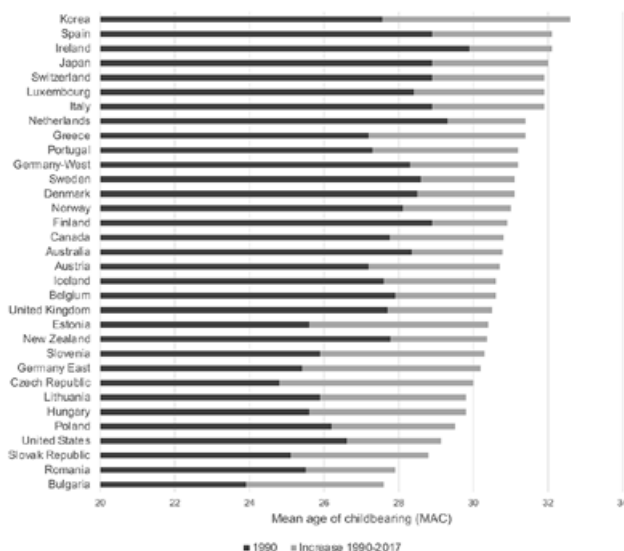
6. DEMOGRAPHY AND MEDICALLY ASSISTED REPRODUCTION

6.1 Postponement of Births and the Increasing Demand of Medically Assisted Reproduction

Since the onset of the second demographic transition (Lesthaeghe 2010) in the 1960s and 1970s in Europe, North America, and Australia, births have been increasingly postponed. This trend has been attributed to a combination of factors, such as rising education and later entry in the labour market; the stratification and differentiation of occupations in the service sector, which increased the length of the on-the-job qualification phase; emancipation and changing gender roles; secularisation and value changes; as well as the separation of sex and reproduction following the introduction of modern contraceptives (Buchholz et al. 2008). In addition, the careers of both partners increasingly have to be considered when couples make fertility decisions. Thus, labour career uncertainty can result in the postponement of births, especially for highly educated women (Kreyenfeld 2010).

The phenomenon of the postponement of births is relevant for MAR because women are increasingly trying to start their fertility biography at ages at which fecundity is already decreasing (Dunson et al. 2004). Thus, postponement amplifies the demand for MAR, especially in subgroups such as highly educated women and their partners. The postponement of births manifests itself in the mean age at childbearing (MAC). For Western European countries, the United States, Canada, Australia, and Japan, the low point of the MAC since World War II was reached in the 1970s, at 25 to 28 years (OECD Family Database 2019). In Eastern European countries, the low point of the MAC was reached in the 1980s or 1990s, at 23 to 25 years. In the OECD countries, the MAC was 27.4 years in 1990, and had increased to 30.6 years by 2017. The increase in the MAC since 1990 has been substantial in most countries: e.g., by at least two years in Finland and the Netherlands; and by as many as five years in East Germany, Estonia, Korea, and the Czech Republic (Figure 26.3). The most recent data show that the countries with the highest MAC are Japan at 32.0 years, Ireland and Spain at 32.1 years, and Korea at 32.6 years. The increase in the MAC is reflected in the increasing ages of the women who seek help in infertility clinics. This is due not only to the increasing problems women encounter when trying to procreate at later ages, but also to normative expectations regarding the ideal age for having a first child (Bujard and Diabaté 2016). Globally, the share of women treated with IVF and ICSI who were aged 40+ was 24.0 per cent in 2011 (Adamson et al. 2018).

The mean age at first birth (MAC1) is probably even more relevant for MAR than the MAC, because many of the women who seek medical help are childless. However, MAC1 data are not available for many countries, and particularly for the 1970s. In 2017, the MAC1 ranged from 26.1 in Bulgaria to 31.6 in Korea, and the unweighted country average was 28.9 (OECD Family Database 2019). However, within the countries, the postponement patterns differ greatly by social strata and education. For reasons explained above, the MAC1 for highly educated women is higher than it is for other educational groups. Based on decomposition analyses for the United Kingdom, France, and Belgium, Neels et al. (2017) showed that the increase in educational attainment accounted for 57 to 74 per cent of the increase in MAC1. Calculations based on German Microcensus data reveal that the proportion of first births after age 35 increased between 2002–2004 and 2012–14 by 40 per cent for highly educated women.



Note: For 2017, data for Australia and the United States refer to 2015, and data for Canada and New Zealand refer to 2016. For 1990, data for Korea refer to 1993.

Source: OECD Family Database (2019); Federal Institute for Population Research (2020). Own representation.

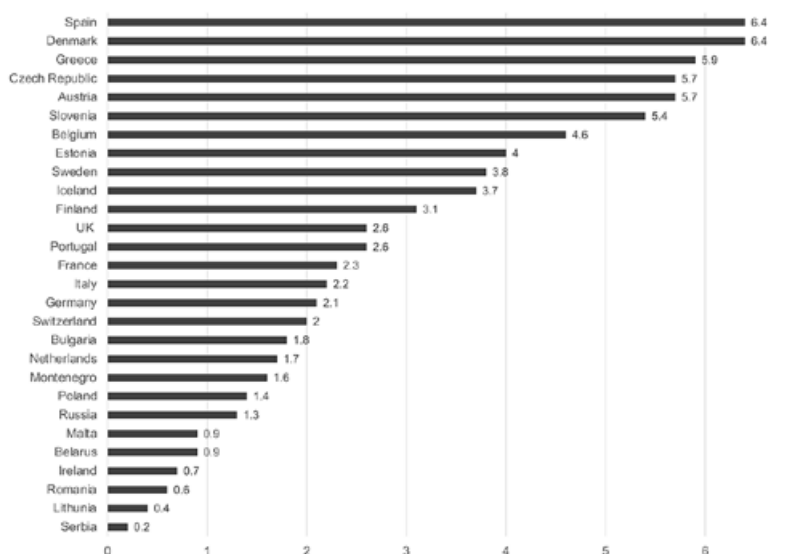
Figure 26.3 Mean age of childbearing 1990 and 2017 in developed countries

According to period calculations of age-specific first birth rates for the years 2012–14, 46 per cent of highly educated women had their first birth by age 35, 26 per cent had their first birth at age 35 or older, and another 28 per cent remained permanently childless (Bujard and Diabaté 2016). It is unclear how many of those women who remained childless did so unintentionally because of medical or social barriers. Collecting survey data on unintentional permanent childlessness is methodologically challenging. At some point, most people come to terms with their situation – in this case, with their childlessness – and their answers to survey questions reflect that acceptance. Measuring the life course experience of infertility could be an alternative approach to identifying people's paths into permanent childlessness in the context of medical barriers. While efforts to measure life course prevalence rates of infertility have many problems, it has been estimated that between one-third and two-thirds of all women experience infertility during their reproductive period.

6.2 Contribution of Medically Assisted Reproduction to Fertility Measures

We lack sufficient data to calculate the contribution of all MAR techniques to fertility. There are, however, data on the proportion of ART children per national births, which indicate that the average for European countries is 2.1 per cent (Geyter et al. 2018). These data do not cover ART treatments that took place in other countries, and potentially with methods that are not allowed in the country of residence. In 2014, ART contributed 6.4 per cent of births in Denmark and Spain; and between 5.4 and 5.9 per cent of births in Slovenia, Austria, the Czech Republic, and Greece (Figure 26.4). In Serbia, Lithuania, Romania, and Ireland, the

contribution of ART was below 0.7 per cent. Projections for 2100 – which are, admittedly, speculative – suggest that by that year, between 1.4 and 3.5 per cent of the world's population will be born through ART (Faddy et al. 2018).



Note: ART includes IVF, ICSI, and FET.

Source: Geyter et al. (2018). Own representation.

Figure 26.4 *Proportion of assisted reproductive technologies per births in European countries*

The effect of MAR on fertility is complex. On the one hand, the use of MAR results in a specific number of births for infertile couples; on the other hand, people might incorporate the option of using MAR in their long-term fertility plans, and thus delay childbirth. However, the use of ART does not guarantee pregnancy, much less the birth of a child. The mean pregnancy rate over all European countries after IVF treatment is 29 per cent, and it is 27 per cent for ICSI (Geyter et al. 2018). Delivery rates are 22 per cent for IVF and 20 per cent for ICSI. Pregnancy and delivery rates strongly depend on age. The IVF pregnancy rate is 30 per cent for women under age 35, is 25 per cent for women aged 35 to 39, and decreases to 14 per cent for women aged 40 or older (Geyter et al. 2018). The success of ART is often overrated. Respondents of a web survey in six European countries estimated that the IVF success rate is 47 per cent (Fauser et al. 2019).

Another perspective on the value of ART for fertility is to estimate how many years of postponement are feasible while realising a specific number of desired children if the success rates of IVF are taken into account. The gain of years for those who intend to use IVF was simulated for different parities and chances of realisation by Habbema et al. (2015). They estimated that to have a 75 per cent chance of realising a two-child family without IVF, a couple would have to start their family at a maximum female age of 34; and that to have the same chances with IVF, the couple would have to start their family at a maximum female age of 35.

The maximum age to realise three children is 31 without and 33 with IVF. Thus, because the success rates are lower than many people expect, the ‘time gained’ by ART is very little. It has been shown that the availability of ART encourages women and men to delay conception (Fauser et al. 2019). Therefore, a MAR-fertility paradox emerges: i.e., the effect of (implicitly) considering the opportunities of MAR on the postponement of family formation could reduce the total fertility rate even more than the MAR births increase the total fertility rate.

7. SUMMARY AND KEY SOCIETAL CHALLENGES

MAR is a dynamic field that has evolved rapidly in recent decades in terms of medical-technological development, and the demand for and access to treatments. We expect that all these factors will contribute to additional increases in the demand for and the usage of MAR in the future. In developed countries, the demand will further increase due to the postponement of births to ages above 35 where the risk of experiencing age-related infertility increases considerably. There are, however, substantial differences in the use of MAR across developed countries: the share of ART births ranges from less than 1 per cent to more than 6 per cent. The share would be even higher if the broader term MAR was used, and treatments such as assisted inseminations were included. MAR is having a large impact on individuals and societies: new family forms are appearing; social inequalities in out-of-pocket expenses and access to treatment are emerging; and biographical plans regarding the timing of fertility are changing. From our overview on MAR in developed countries, we draw six conclusions.

Reproductive medicine is more than ART. The terms ART and IVF are often used interchangeably. Indeed, IVF is the core ART treatment, and other ART treatments – such as oocyte donation, PGT, or social freezing – are based on it or related to it. However, the term ART does not cover assisted inseminations, hormonal therapies, or other interventions that are frequently applied in the treatment of individuals or couples. Assisted inseminations and hormonal therapies are less invasive, less costly, and have few side effects – and they might be as effective as ART in helping women or couples have their intended number of children. The utilisation of the term MAR is not only more comprehensive; it paves the way for recording the use of medical reproduction more accurately in surveys and analyses.

There is no simple solution to the moral and ethical issues involved in national legislative processes regarding MAR. Across developed countries, the laws regulating MAR differ not only in terms of which methods are allowed, but in terms of how the methods are applied, who has access to them, and how they are reimbursed. Oocyte donation is permitted under specific conditions in most developed countries. Surrogacy is allowed in only some countries, and in these countries the rules regarding the payment of the surrogate, the definition of altruistic surrogacy, and the rights of the surrogate and of the commissioning parents differ. The diagnostic treatment PGT is permitted in most countries, sex selection is allowed only in some countries, and SFR is allowed in most countries, but often under specific conditions. These national differences reflect differences in how general moral values and ethical considerations are weighed in national legislative processes. Moreover, the decisions on who is supported in their attempt to have a child reflect normative expectations regarding acceptable ways of building a family and acceptable family forms.

Cross-border reproductive care challenges MAR users and societies. Each country has its own legal regulations, but the use of technologies such as MAR is not bound by country

borders. More and more people now travel abroad to obtain lower-priced treatments, or to gain access to methods that are not allowed in their home country, or that they are excluded from accessing. However, knowledge about the magnitude of cross-border reproductive care around the globe, and about who is using it, remains limited. For prospective parents, making decisions about seeking medical help becomes much more complex if reproductive travelling has to be considered.

Cross-border reproductive care represents a challenge to the thinking of courts, social scientists, and policy-makers. Its use can result in complicated legal issues when, for example, it comes to legalising families that were created in another national context where oocyte donation or surrogacy is allowed. The 'new families' created with the help of treatments such as surrogacy or oocyte donation challenge local authorities with their requests to legalise their status as a family. It has been argued that the increasing visibility of new family forms could initiate changes in domestic laws in a bottom-up process (Naldini and Long 2017) that unfolds over the medium to long term. Social scientists should respond to these social changes in their research. We need more knowledge about the empirical relevance of 'new families' created with medical help in the home country or abroad. Moreover, we should seek to learn more about the experiences of these families during their 'reproductive journeys'. In addition, we should seek to better understand what the consequences of these journeys are, especially for the health of women in poorer countries who are surrogates or donate their oocytes, and for global social inequalities.

Country differences in legislation and reimbursement raise social inequalities. In most developed countries, at least some of the medical costs of treatment are publicly funded. There are often restrictions on funding based on the age of the prospective mother and parity. Policies vary regionally in some countries. Moreover, funding is often provided for specific treatments only, and the number of treatment cycles an individual can receive is usually limited. Out-of-pocket expenses can be considerable. Hence, prospective parents with higher incomes and better education tend to have better access to MAR treatments than their lower-income counterparts. The reimbursement issue is ethically challenging, because in several cases MAR treatments are not related to an illness. This is especially the case for social freezing, as most of the women who use this service are making a private decision to postpone getting pregnant to higher and less fertile ages.

The interrelation of MAR and demographic behaviour is not straightforward. The MAR–fertility paradox implies that the continuing postponement of births to higher ages and the increasing use of MAR go hand in hand. The postponement trend increases the demand for MAR, especially among highly educated couples, who often have the high income needed to enable them to finance fertility treatments. There are clear hints that people overestimate the success rates of MAR, especially for older women. The availability of MAR may increasingly become part of people's fertility plans over the life course, which could result in a MAR–fertility paradox emerging in the future. The effect of MAR on completed fertility could decrease because the negative effect of planning with MAR could be even greater than the number of MAR babies who will be born. In any case, the interrelations of MAR and life course decisions should be analysed carefully in the future, and education about fertility should be improved.

Limited knowledge of the implications of using MAR for prospective parents and children. While MAR can represent a solution for people who face medical or social barriers to meeting their fertility goals, the risk of failure is non-negligible. It is important to keep this risk in mind

when talking about the ‘costs’ of treatment, which are not just financial in nature. Fertility treatments can be physically and psychologically stressful for those who use them, with women being more affected than men. Knowledge about the implications of treatments for the families and children created with MAR is starting to accumulate. Overall, it appears that MAR is not harmful for the health and social-psychological outcomes of the children born through such treatments. Child welfare is not directly affected by the structure or the type of family a child is born into. However, there is a need for more research on the long-term effects that is designed to control for important confounders. Beyond that, studying ‘MAR families’ provides researchers with an opportunity to examine the effects of family structure and family processes in traditional and non-traditional families.

NOTE

1. In traditional surrogacy, the surrogate’s own egg is fertilised *in vivo*, usually with the help of assisted insemination.

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27. Key developments and future prospects in the study of transnational families

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1. FROM 'MIGRANT' TO 'TRANSNATIONAL' FAMILIES

Today, the terminology of *transnational families* is common in research, and increasingly appears in public and political debates as well (e.g., COFACE 2012). This term is, however, relatively new, and its use both reflects and supports a wider shift in migration studies that began at the turn of the Millennium and that has been called the 'transnational turn'. During the mid-1990s, and based on the observation that family members regularly engage in transnational practices across national borders, anthropologists Linda Basch, Nina Glick-Schiller, and Cristina Szanton-Blanc proposed a reconceptualisation of the dominant representation of migrants as 'uprooted' from their country of origin; rather, they advocated conceiving of migrants as 'transmigrants' who maintain multiple links and connections with their home societies (Basch et al. 1994; Glick Schiller et al. 1992; Schiller et al. 1995). Their approach was widely endorsed by migration scholars, and inspired a wave of social and political science research highlighting the importance of economic, cultural, political, religious, and social transnational dynamics (Vertovec 2009) and transnational social fields that connect sending and receiving societies (Levitt and Glick Schiller 2007; Levitt and Jaworsky 2007). *Transnationalism* in this context is defined as 'a social process in which migrants establish social fields that cross geographic, cultural, and political borders' (Glick Schiller et al. 1992, p. ix). Thus, migration is no longer conceived of as a one-way movement from one country to another, and national belonging is no longer seen as an either-or scenario. This conceptualisation has been further fuelled by the development and democratisation of transportation and communication technologies. These technologies have (under certain conditions) facilitated mobility and connectedness, which can be seen as another transformation that has simultaneously led to what has been coined the 'mobility turn' in social sciences (Sheller and Urry 2006; Urry 2000, 2007).

Although, as Vertovec (2009, p. 61) noted, '[t]he provenance of most everyday migrant transnationalism is within families', familial transnational practices had been largely neglected in mainstream transnationalism scholarship, which considered them as 'weak' forms of transnational engagement, as opposed to the 'stronger' forms that take place in the 'public' sphere (Gardner and Grillo 2002; Legall 2005). In this context, feminist scholarship has played a key role in illuminating the issue of female migration, and in bringing the topic of family migration onto the centre stage (Parreñas 2000). This scholarship challenged the then common bias in migration studies that characterised men as drivers of migration and women as followers. These studies showed that large numbers of women from the Global South migrate alone to the Global North in pursuit of better economic prospects, and highlighted how the absence of mothers can pose challenges for their non-migrant children and wider communities. The term

‘transnational motherhood’ was coined by Pierrette Hondagneu-Sotelo and Ernestine Avila (1997) to capture the alternative constructions of motherhood actively created by Central and Latin American women leaving their children ‘back home’ in order to work in the United States as nannies or housekeepers. Subsequent studies of transnational motherhood continued to focus primarily on female migrant domestic workers in the Global North, locating them in a broader economic and political context of exploitation; i.e., in an international division of reproductive labour (Parreñas 2000) also known as ‘global care chains’ (Ehrenreich and Hochschild 2003; Hochschild 2000).

While the theoretical foundations of transnational motherhood studies emerged in America, the term ‘transnational families’ first appeared in European scholarship. In 2002, Bryceson and Vuorela published their edited book, *The Transnational Family: New European Frontiers and Global Networks*. The volume presented the results of a conference on migrant families in Europe held at the African Studies Centre in Leiden in 1999, which brought together social scientists whose work documented ‘the creativity of people in devising ways and means of sustaining the idea of *familyhood* amidst family members’ worldwide dispersal’ (Bryceson and Vuorela 2002b, p. xi). The editors defined transnational families as ‘families that live some or most of the time separated from each other, yet hold together and create something that can be seen as a feeling of collective welfare and unity, namely familyhood, even across national borders’ (Bryceson and Vuorela 2002a, p. 18). This definition is now the most commonly used in the field.

As Legall (2005) has noted, scholarship on transnationalism and families can be divided into two (not mutually exclusive) strands: transnational parenting (with mothering centre stage); and transnational kinship (mainly referred to as transnational families literature), which embraces a wider definition of the family, including inter- and intra-generational relationships beyond nuclear families (Baldassar et al. 2014; Crespi et al. 2018; Mazzucato 2013). Although the themes covered by the latter strand are wide ranging, a special emphasis has been placed on the key role care plays in the maintenance of family relationships across distance and national borders (e.g., Baldassar et al. 2007; Barglowski et al. 2015; Fog Olwig 2014; Huang et al. 2012; Leifsen and Tymczuk 2012; Merla 2015; Radziwinowiczówna et al. 2018; Reynolds and Zontini 2006).

Care has been a central theme in our own work on transnational families. The concept of ‘transnational care’ was first introduced by Baldassar et al. (2007) in their analysis of the ways adult migrant children in Perth, Western Australia – one of the most geographically isolated capital cities in the world – manage to care for their ageing parents across vast distances, including in Europe (Italy, Ireland, and the Netherlands). Their conceptualisation of transnational caregiving as a set of practices governed by a dialectic of capacity, cultural obligation, and negotiated family commitments drew on Finch and Mason’s (1993) analysis of the negotiation of family obligations to provide (proximate) care and support, and their broad definition of care as involving physical, financial, emotional, and practical support, as well as accommodation. This work was extended by Baldassar and Merla, who identified a set of resources (or capabilities) supporting transnational family members’ capacity to provide – and receive – care, including mobility, communication, social relations, time, money, knowledge, and appropriate housing (Merla 2012; Merla and Baldassar 2011). In 2014, they proposed a new conceptualisation of care flows as *care circulation* (Baldassar and Merla 2014), in part in response to the focus in Global Care Chains on care dyads; and in order to emphasise the extended, intergenerational, and complex care relationships that characterise transnational

families. Care circulation is thus defined as ‘the reciprocal, multidirectional and asymmetrical exchange of care that fluctuates over the life course within transnational family networks subject to the political, economic, cultural and social contexts of both sending and receiving societies’ (Baldassar and Merla 2014, p. 22). This framework also helped to illuminate largely invisible actors of care flows, including men (Fresnoza-Flot 2014; Kilkey 2014) and children (Fog Olwig 2014; Poeze and Mazzucato 2014).

2. TRANSNATIONAL FAMILIES AND (SOCIAL) POLICIES

While it was initially informed predominantly by anthropological and sociological perspectives, in more recent years a social policy lens has been applied to transnational family scholarship. This approach emphasises the institutional contexts that help shape the circulation of care among families across borders. Above all, this literature highlights the role migration policies can play in creating transnational families by restricting the rights of family members to accompany migrants, or to subsequently reunite with family members who have migrated. In the European context, two main types of transnational families have been prominent in this research. The first is that of migrant care workers from Third Countries¹ who, because of either their irregular migration status or the conditions imposed by their entry and residence visas, are forced to leave family members behind in the country of origin, including spouses, children, and older dependents (Lutz and Palenga-Möllnbeck 2012). The second type refers to migrants arriving in Europe as part of the so-called ‘refugee crisis’ in 2015–16 (see Kushnir et al. 2020). As a result of a tightening of asylum and refugee policies, regulations, and practices in the countries of destination – as well as restrictive practices on route through the Middle East and Europe, such as detention – those recent arrivals now have family members scattered within and across continents (Näre 2020).

A social policy lens has also been applied to draw attention to the institutional ‘gaps’ that create the need for ongoing family solidarities across borders. Studies have highlighted the weak or non-existent welfare provision in the migrants’ countries of origin in the Global South and the poorer regions of Europe, which reinforce the critical role played by remittances in sustaining the well-being of family members back home (Yeates and Owusu-Sekyere 2019). These studies illuminated institutional weaknesses in the countries of destination. For example, when migrants lack access to child care, or if the care is unaffordable or of poor quality, grandparents from abroad may be mobilised to provide care for their grandchildren while their migrant parents work (Kilkey et al. 2013; Nedelcu and Wyss 2020; Ryan 2011; Wilding and Baldassar 2009). Institutional gaps in the countries of origin and of destination have been exacerbated in the context of global neoliberal governance, which has been shaping societies according to market principles since the 1980s. The emphasis on individual responsibility has further intensified since austerity measures were introduced following the global financial crisis of 2008–2009 (Baldassar et al. 2018). Such processes are producing what has been called a ‘crisis of care’ (Baldassar 2016a) or a ‘crisis of social reproduction’ (Kofman and Raghuram 2015), which has reinforced the need for transnational family welfare safety nets (Baldassar et al. 2018).

In addition to describing the emergence of transnational families and the growing need for family solidarity across borders, social policy analysts have shown how institutional contexts are shaping the capacity of family members to meet those needs. This dynamic is captured

most comprehensively in Kilkey and Merla's (2014) notion of 'situated transnationalism'. Informed by Baldassar and Merla's (2011) work on the resources required for transnational caregiving (see above), situated transnationalism identifies the social and public policy realms through which those resources are partially derived in countries of origin and of destination, and in global/international sites of governance. Informed further by welfare state theory (Esping-Andersen 1990), situated transnationalism focuses on the relevant arrangements in migration, welfare, and gendered care and working-time regimes. It also highlights the importance of policies that affect the availability and affordability of cross-border transport, and of policies that influence the quality and accessibility of telecommunications infrastructure, including information and communication technologies (ICT).

Kilkey and Merla (2014) emphasised that the various regimes and regulations intersect to create contexts that facilitate or hinder the circulation of care within different types of transnational families and across *all* social categories, albeit in highly differentiated ways. Migrant care workers are, however, often treated as the paradigmatic case in research on the degree to which migrants' transnational care responsibilities are recognised in European societies. The presence of large numbers of migrant care workers in Europe is in large part the result of European states adopting transnational solutions to their own 'care crises', which have emerged in the context of demographic ageing, increasing employment among women, and neoliberalism (Kilkey et al. 2018). However, European states' transnational practices in the area of care are deeply asymmetrical. Focusing on migrants from the Global South, Degavre and Merla (2016) showed that migrant women are often excluded from accessing European societies' care systems to support their own transnational family care needs. The reasons are two-fold. First, the workers' precarious positioning on the secondary labour market as migrants – many of whom are on temporary and circular visas – doing low-skilled work largely disqualifies them from accessing many state supports. Second, the welfare and care provisions of states operate according to the principle of 'territoriality' (Böcker and Hunter 2017), which implies 'first that welfare state benefits are preserved for persons residing or working on the state territory, and secondly that they must be consumed on the state territory' (2017, p. 355). Thus, while states may operate transnationally to solve their care crises, the transnational care responsibilities of migrant care workers are largely unrecognised, generating inequalities between migrants and non-migrants, and especially among the women who are most engaged in transnational care giving (Williams 2018).

Degavre and Merla's (2016) argument was developed in relation to migrants from the Global South. They acknowledged that for mobile European Union (EU) citizens, including those engaged in care work, who migrate under European Free Movement provisions, several measures in particular tend to facilitate the transnational circulation of family care. These include the portability of pensions, which allows European retirees who move to another member state to look after their grandchildren to receive their pension benefits abroad; parental leave benefits, which enable workers to take time off to care for a child while residing in another EU country; and cash benefits to support children 'left behind' in another EU country. Therefore, as Kilkey and Urzi (2017) have argued, we also need to be attuned to the patterns of 'stratified social reproduction' based on migrant status that are embedded in European societies. While the differences in the rights accorded to mobile EU citizens and Third Country nationals represent a key axis of stratification in Europe in the capacity of families to socially reproduce themselves in the process of migration, we should note that the relatively privileged position of EU migrants vis-à-vis welfare systems is increasingly contested in a number of

member states, with the United Kingdom in the context of Brexit being the most prominent example (Kilkey 2017).

Näre (2013) has cautioned against assuming that non-migrant women in Europe and their family members are clear ‘winners’ in their government’s transnational approach to solving the care crisis. Applying an intersectional lens, she argued that European women who employ migrant care workers, particularly in the familial welfare regimes of southern Europe, are themselves often unemployed or underemployed, and carry significant care burdens of their own that make hiring migrant care workers their only affordable solution. Näre (2013) highlighted the ethical challenges inherent in this scenario, not only from the perspective of the migrant care workers, but from that of the families who use their services.

In a departure from social policy analysts’ dominant focus on formal/public welfare provision, recent work in the area of transnational social protection has emphasised ‘social protection constellations’, which incorporate ‘not only nation-states, but also migrants themselves, NGOs [non-governmental organisations], religious communities, and international organizations’ (Faist 2017, p. 21). As Faist has pointed out, migrants negotiate between these more informal welfare systems and formal welfare schemes, from which, as we noted above, they are often fully or partially excluded. Faist’s (2017) focus was on how formal and informal systems of social protection intersect to (re)produce transnational inequalities between places. However, through the concept of ‘care and protection assemblage(s)’, Amelina (2017) has extended this research on the formal and the informal systems in the realm of social protection to examine the resulting inequalities between families in their ability to provide care in the process of migration. In a further departure from the dominant focus of the abovementioned literature, Amelina and Bause (2020) most recently applied the concept of ‘care and protection assemblage(s)’ to the situation of forced migrants in Europe who arrived during the so-called ‘refugee crisis’ in 2015–16 (Kushnir et al. 2020). Amelina and Bause (2020) analysed how informal, semiformal, and formal care and protection arrangements interact to secure the welfare of transnational families within such contexts, and emphasised the production and reproduction of inequalities in the capacity to access such arrangements, particularly in terms of gender and legal status.

3. TRANSNATIONAL FAMILIES AND COMMUNICATION TECHNOLOGIES

In addition to studying the regimes, regulations, and policies that shape transnational families, migration scholars are increasingly recognising the importance of the material contexts within which transnational families are sustained. In particular, the rapid changes in ICT are transforming how families communicate, how they imagine themselves, and how they organise their everyday lives. The scale of this transformation is made clear if we consider two key books in the field. In Bryceson and Vuorela’s (2002) edited book, *The Transnational Family*, the communication tools used to maintain and connect transnational families were only mentioned a handful of times. When they were mentioned, it was to indicate that international telephone calls are prohibitively expensive, or to suggest that family histories of letter writing were gradually being replaced by email communications. This is in stark contrast to the account of transnational family life published only 10 years later by Madianou and Miller (2012, p. 3), which demonstrated that transnational families have become embedded in ‘poly-

media environments', in which the affordability of a particular communication option has been displaced by other concerns: i.e., by the 'social and moral questions rather than technical or economic parameters' of the multiple modes of communication that are readily available.

In interviews conducted with Irish migrants at the turn of the century, Wilding (2006) noted that histories of communication are also histories of family relationships, and of a sense of *familyhood*. Prior to the 1990s, families had relied primarily on letters to communicate with each other. This mode of communication was slow, with letters often taking weeks or even months to travel between Europe and Australia. However, when composed by a skilled writer, these letters were rich in detail, and created a unique form of intimacy between the writer and the reader. International telephone calls, while possible, were prohibitively expensive at the time, and had a very different emotional impact. This was largely because they were typically used to convey urgent information, such as an illness or a death in the family. In contrast to the pleasures of a letter, an unexpected phone call was something to be feared, not enjoyed.

By the 1990s, transnational families were increasingly able to rely on emails, faxes, cheaper telephone calls, and remittance technologies (Baldassar et al. 2007; Madianou and Miller 2011; Panagakos and Horst 2006; Yujuico 2009). These tools intensified the frequency of contact, while also changing the content and the direction of communications. For example, while letters were often exchanged between mothers and daughters, emails were more likely to bring brothers, sisters, cousins, and other family members into more complex multi-directional communication patterns (Wilding 2006). However, none of these technologies were as transformative as the introduction of the mobile phone. Unlike the fixed line telephone, which belongs to a household or a community, the mobile telephone is 'mobile; flexible and customisable; associated with a person rather than a household' (Goggin 2006, p. 2). This technology has enabled some of the poorest people in some of the world's poorest nations, such as the Philippines, to leap forward in their telecommunication capacities, and to engage economically, socially, and culturally across the globe, without having to bear the burden of installing or maintaining expensive landline infrastructure (Portus 2016).

One of the most significant contributions of the mobile phone to contemporary social life was conceptualised by Christian Licoppe (2004). Although he focused on proximate family relationships, and did not explicitly address the transnational family, he highlighted the emergence of 'connected relationships', in which 'the (physically) absent party renders himself or herself present by multiplying mediated communication gestures up to the point where copresent interactions and mediated communication seem woven in a seamless web' (Licoppe 2004, p. 135). It is this capacity of members of transnational families to seemingly defy distance by making themselves 'present' in each other's lives through ICT that has been the focus of recent transnational family research.

There is now ample evidence that the practices of transnational connection and care have changed and expanded over time as the technologies available to support them have diversified. These significant transformations have raised questions about whether these polymedia environments are creating new ways of caring, thereby challenging our normative ideas about how we care, and, in particular, the importance of physical proximity to family and caring relationships (Baldassar et al. 2016). Building on previous work that identified communication and visiting practices as fundamental to transnational family care (Baldassar et al. 2007), Baldassar (2008) argues that these can be categorised into four types of co-presence: virtual (created through various ICT), imagined (created through thoughts and prayer), physical

(created in proximate face-to-face settings), and proxy (created indirectly through objects and people whose physical presence embodies the spirit of the absent person).

These technological transformations also have implications for how transnational families maintain relationships and perceive their relationships. For example, Madianou and Miller (2012) demonstrated that the mobile phone has changed what it means to be a mother who travels overseas for work. The women they interview work overseas to provide their children with higher levels of education and material comfort. In the past, fulfilling this goal required mothers to relinquish their involvement in the lives of their children, with some left-behind children no longer recognising their despairing mothers. Access to mobile phones and social media now means that mothers can remain in constant contact with their left-behind children, including monitoring their friendships and school attendance, assisting them with their homework, and participating in family meals. The resulting relationships are not necessarily positive or idyllic. Some children resist what they see as surveillance and micromanagement from their mothers, and some mothers report that the level of intimacy with their children is still unsatisfactory (Madianou and Miller 2012; Parreñas 2005). However, compared with the experiences of earlier generations, these long-distance parenting relationships more closely approximate the complex and multi-layered relationships that mothers and children navigate when living in the same household.

It is not just mothers who engage in transnational parenting across distance. Indeed, the combination of newly emerging models of 'involved' fathering and new communication technologies seem to be contributing to shifting practices of 'transnational fathering'. Early transnational families research has suggested that while both mothers and fathers are expected to provide financial and material support from a distance, only mothers are responsible for providing emotional care (e.g., Hondagneu-Sotelo and Avila 1997; Parreñas 2005). However, there is evidence that this gender division is shifting. For example, research with Polish male migrants living in the United Kingdom has demonstrated that fathers, like mothers, are increasingly being called upon to perform the emotional labour of long-distance relationships that was once primarily the responsibility of women (Holmes 2014; Kilkey et al. 2013; Lee 2019).

What is clear from this body of research is that communication technologies are particularly important to families who have a limited ability to share physical co-presence. This point is especially evident in research on asylum seekers and irregular migrants (e.g., Harney 2013). For example, Alexandra Greene's (2019) recent work with refugee women in Greece showed how phones provide these women with opportunities to maintain connectedness with family, and to resist the potential despair that can arise while waiting to secure a safe, permanent home. The dispersal of family networks as a result of forced migration has inspired innovative uses of digital media to reproduce a sense of familyhood and connectedness. For example, Robertson et al. (2016) observed in their research on young Burmese refugees that these young people have experienced two forms of separation from family: first when fleeing violence in Burma, and then again when being resettled in countries around the world. One of the creative responses of these young people to this separation has been to use digital media to manipulate images of themselves and their family members in order to reposition them in the same space. In this way, they create a 'family imaginary' that denies the separation that has been imposed on them by persecution and migration regulations.

Imaginaries of family and belonging can also be extended to whole communities, particularly in cases in which the migrants' homeland has been destroyed. Hariz Halilovic (2013)

has written evocatively about how migrants of the Bosnian diaspora have, in the absence of a shared physical home, come to rely on virtual spaces to create community and family ties. In addition, there is evidence that having access to virtual communities is of particular importance to marginalised people, such as live-in care workers who often have little free time and limited mobility beyond the confines of their employer's home (Brown 2016). These are stark examples of relationships that would not exist without access to new technologies – and yet, arguably, all transnational relationships are to varying degrees co-constituted by the technologies themselves, i.e., the devices themselves give substance to relationships (Ahlin 2018). Similarly, Baldassar (2016b) has hypothesised that communication technologies are an example of what Bennett has called 'vibrant matter', because they have 'the capacity ... not only to impede or block the will and designs of humans but also to act as quasi agents or forces with trajectories, propensities, or tendencies of their own' (Bennett 2010, p. viii).

More recently, Baldassar and Wilding (2020) have proposed the notion of *digital kinning* – defined as the inherently relational practices and processes of caring through the use of new technologies – to highlight the role of these technologies in the care networks of older people. The term *kinning* emphasises that these new technologies are embedded in social relationships of reciprocity based on the exchange of care and support. Given their relational nature, all of these digital practices involve forms of relationship building, maintenance, or curation, which are well captured by the concept of kinning. In the case of older people's care networks, these digital kinning practices often require facilitation by others, which tends to reinforce their social relational nature. It is in these creative and diverse practices at the intersection of materialities, mobilities, and technologies that we see how technologies are transforming families and relationships.

4. CONCLUSION AND FUTURE DIRECTIONS FOR RESEARCH

To date, research on transnational families and care circulation (including our own) has been largely focused on 'de-demonising' distance and highlighting the important role of the reciprocal exchange of care across national borders using ICT and new technologies. Some of this work has, however, inadvertently underemphasised the important role of physical proximity, and the related mobility rights required to support it, in the practices and processes of transnational care circulation trajectories. The current political context of austerity that arose in response to the 2008 Global Financial Crisis (ILO 2014; Ortiz et al. 2015) and restrictionist migration policies are dramatically affecting transnational families, both by reinforcing their importance as safety networks and welfare providers, and by affecting their capacity to play these roles both locally and transnationally (Baldassar et al. 2018). Transnational linkages sustained by the circulation of bodies, which have been made possible through increasingly affordable and available modes of travel, have been placed under severe strain by today's policies and rhetorical statements of 'closure, entrapment and containment' (Shamir 2005, p. 199). A growing body of literature is currently exploring the intersections between mobility regimes and family relations (Bonizzoni 2018; Kilkey 2017; Kofman and Raghuram 2015; Van Walsum 2013). This research agenda should certainly include deeper examinations of how transnational family care arrangements are challenged and transformed under these regimes, and of the consequences of severely limited or curtailed rights to cross borders for

the purposes of giving or receiving care. We have started to engage in such research, and our initial findings have led us to argue that the regimes of mobility that currently govern care-related mobility have ‘immobilising’ effects on people’s lived experiences, including on their sense of well-being (Merla et al. 2020). The notion of *immobilising regimes* refers here to ‘the combination of state immigration policies around migrants’ entry, settlement and social, economic and political incorporation, as well as hegemonic constructions of migrants and migration. These immobilizing regimes block the physical mobility of some, while granting highly conditional mobility to others, resulting in situations of enforced and permanent temporariness and ontological insecurity’ (Merla et al. 2020, pp. 15–16). Thus, these regimes affect the trajectories of transnational care circulation over time, and particularly the capacity for short-term visits, long-term re/expatriation, and circular mobility within family networks. Such restrictions can result in various combinations of immobility/mobility and entrapment. There is a crucial need to further explore these dynamics, and to bring these issues to the forefront of policy agendas.

The urgency of making transnational families’ needs (and contributions) more visible to policy-makers leads us to propose a second direction for future research. To date, this literature has been largely dominated by qualitative, in-depth empirical studies that helped to illuminate the complex dynamics of transnational family life through the examination of the concrete practices and experiences of migrants and their kin. Quantitative perspectives on transnational families have mainly focused on the effects of parental migration on the health, education, and well-being outcomes of their left-behind children, usually by comparing transnational and non-migrant families (for a review, see Mazzucato 2013). These studies have recently taken an important step forward by developing cross-national comparisons (Mazzucato and Dito 2018). However, we still lack a comprehensive quantification of transnational care flows that includes all forms of care. The quantification by feminist economists of the unpaid household labour performed by women has played a key role in the ‘visibilisation’ and recognition of gender inequalities, and in the policy responses to them (Jany-Catrice and Méda 2011). Similarly, there is an urgent need to develop instruments and methodologies to produce large-scale data on the invisible labour performed by members of transnational families, and the contributions this labour makes to the economies of receiving and sending societies.

NOTE

1. Third Countries are countries that do not belong to the European Economic Area (European Union Member States plus Iceland, Liechtenstein, and Norway).

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