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Christine Schwartz

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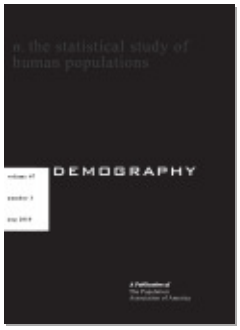


PATHWAYS TO EDUCATIONAL HOMOGAMY IN MARITAL AND COHABITING UNIONS*

CHRISTINE R. SCHWARTZ

There is considerable disagreement about whether cohabitors are more or less likely to be educationally homogamous than married couples. Using data from the National Longitudinal Survey of Youth, I reconcile many of the disparate findings of previous research by conducting a "stock and flow" analysis of assortative cohabitation and marriage. I find that cohabitors are less likely to be educationally homogamous than married couples overall, but these differences are not apparent when cohabiting and marital unions begin. Instead, the results suggest that differences in educational homogamy by union type are driven by selective exits from marriage and cohabitation rather than by differences in partner choice. Marriages that cross educational boundaries are particularly likely to end. The findings suggest that although cohabitors place greater emphasis on egalitarianism than married couples, this does not translate into greater educational homogamy. The findings are also consistent with a large body of research on cohabitation and divorce questioning the effectiveness of cohabitation as a trial marriage.

The dramatic increase of cohabitation in the United States has inspired much interest in what cohabitation is and where it fits into the American family system (Smock 2000). Many studies have attempted to better understand the nature of cohabitation by comparing cohabitors and married couples on characteristics such as gender role attitudes, differences in time spent on housework and paid work, and fertility behavior (e.g., Clarkberg, Stolzenberg, and Waite 1995; Raley 2001; South and Spitze 1994). Still another way to illuminate differences is to examine differences in partner choice. If cohabitation and marriage have different institutional characteristics, people may choose their partners differently depending on the type of relationship sought (Schoen and Weinick 1993).

Because cohabitation in the United States lacks the norms, expectations, and long-term commitment of marriage, cohabitors may be more likely to live with partners that they are less sure about; that they do not intend to marry; or for whom there are normative pressures against marrying, such as persons of a different race/ethnicity, religion, or age (Blackwell and Lichter 2000, 2004; Schoen and Weinick 1993). In other words, cohabiting couples may be less alike, or less apt to be *homogamous*, than married couples. At the same time, because cohabitation lacks the legal protections of marriage, cohabitors may also be less likely to specialize economically than married couples (Brines and Joyner 1999; Schoen and Weinick 1993). Empirical research is consistent with both claims: cohabiting couples tend to resemble each other less than married couples on ascribed characteristics, such as race/ethnicity, religion, and age (Blackwell and Lichter 2000, 2004; Jepsen and Jepsen 2002; Joyner and Kao 2005; Schoen and Weinick 1993), whereas they tend to be more alike

*Christine R. Schwartz, Department of Sociology, University of Wisconsin–Madison, 1180 Observatory Drive, Madison, WI 53706; e-mail: cschwart@ssc.wisc.edu. This research was carried out using the facilities of the Center for Demography and Ecology at the University of Wisconsin–Madison (R24 HD047873) and the California Center for Population Research at the University of California, Los Angeles (R24 HD041022). Earlier versions of this article were presented at the 2005 meetings of the Population Association of America in Philadelphia and the 2004 meetings of the ISA Research Committee 28 on Social Stratification and Mobility (RC28) in Rio de Janeiro, Brazil. I am grateful to Elizabeth Bruch, Katherine Curtis, Felix Elwert, Michel Guillot, Sanjiv Gupta, Daniel Lichter, V. Joseph Hotz, Hiroshi Ishida, Robert Mare, Christopher McKelvey, Jenna Nobles, James Raymo, Judith Seltzer, Megan Sweeney, Donald Treiman, Zhen Zeng, and two anonymous reviewers for their helpful comments and advice.

on achieved characteristics, such as earnings and employment (Brines and Joyner 1999; Casper and Bianchi 2002).

Although theory and evidence are consistent with respect to differences in couple resemblance on many characteristics, there is considerable disagreement with respect to education. Some scholars have argued that cohabitors should be more likely to be educationally homogamous than married couples (Schoen and Weinick 1993), whereas others have argued the opposite (Blackwell and Lichter 2000, 2004). The empirical evidence also varies widely. Using data from the late 1980s and early 1990s, one study found that cohabitors were more likely to be educationally homogamous than married couples (Schoen and Weinick 1993); another study found the reverse pattern (Blackwell and Lichter 2000), and still others found no difference (Jepsen and Jepsen 2002; Qian 1998) or that the results vary by educational level (Blackwell and Lichter 2004).

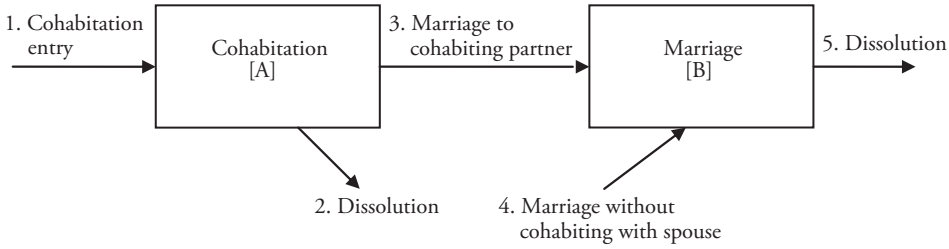
A limitation of previous research is that it has often compared the educational resemblance of cohabitors and married couples by using cross-sectional data (Blackwell and Lichter 2000; Jepsen and Jepsen 2002; Spanier 1983), which do not allow researchers to identify the mechanisms through which differences in couple resemblance arise. There is also a growing body of literature on homogamy as couples transition into and out of cohabitation and marriage (Blackwell and Lichter 2004; Goldstein and Harknett 2006; Sassler and McNally 2003), but none of these studies has systematically examined how these transitions work together to affect overall differences in homogamy by union type. In this article, I use log-linear models and data from the National Longitudinal Survey of Youth to examine how educational homogamy varies as couples move into and out of cohabitation and marriage. I adopt a "stock and flow" framework to examine (1) the basic question of whether the "stock" of all married couples or all cohabitors is more likely to be educationally homogamous, and (2) which transitions, or "flows," are responsible for these differences.

In so doing, this article makes three main contributions. First, by using a stock-and-flow framework, I show how many of the disparate findings of past research are, in fact, coherent pieces of a larger process of assortative entry and exits from unions. In this respect, the article adds to literature cautioning researchers against using cross-sectional data to draw conclusions about the mechanisms that generate differences between cohabitors and married couples (Kenney and McLanahan 2006). Second, the results help adjudicate between competing hypotheses about the nature of marriage and cohabitation with respect to sorting on education, and offer new insights into these processes. Finally, I use the findings as a basis for tentative speculation about the impact of the rise of cohabitation on trends in educational assortative mating in marriage. Studies of trends in the educational resemblance of spouses have generally found an increase in spousal resemblance since at least the 1960s (e.g., Kalmijn 1991; Qian and Preston 1993; Schwartz and Mare 2005; but see Rosenfeld 2008). Increases in the prevalence of cohabitation may explain part of this trend if cohabitation functions as a trial marriage that "weeds out" educationally dissimilar couples before marriage.

A STOCK-AND-FLOW FRAMEWORK

This article uses a stock-and-flow framework for describing differences in the educational resemblance of cohabitors and married couples. Figure 1 shows the different flows into and out of cohabitation and marriage that may affect resemblance in the stock of prevailing cohabiting and marital unions (boxes A and B). The stock of unions represents all cohabiting and marital unions that exist in the population at a given time; researchers that have relied on cross-sectional data have examined stocks of unions. Differences in educational homogamy in the stocks of unions can be generated in a variety of ways. First, the odds of homogamy among newly formed cohabiting and marital unions may differ (transitions 1, 3, and 4). Second, the odds of homogamy among cohabitors and married

Figure 1. Stock-and-Flow Diagram of Transitions Into and Out of Cohabitation and Marriage



couples who exit their unions may also differ (transitions 2, 3, and 5). For example, differences in the stocks of unions may be generated by differences in partner selection (transitions 1 vs. 3 + 4), by differences in educational homogamy between cohabitors who split up and those who marry (transitions 2 vs. 3), and/or by differences in the selective dissolution of cohabiting and marital unions (transitions 2 vs. 5).

The overall impact of each of these flows is a function of (1) the extent to which entries and exits from cohabitation and marriage are selective of homogamous couples, and (2) the likelihood that couples make these transitions. Even if divorce is highly selective of educationally dissimilar couples, for instance, divorce cannot have a large impact on the resemblance of married couples if divorce is rare. Thus, in what follows, I present results from life tables showing the likelihood that couples make each of the transitions shown in Figure 1 as well as results from log-linear models comparing the odds of homogamy across these transitions. Before doing so, however, I review previous theory and evidence on differences in educational homogamy by union type.

PREVIOUS RESEARCH

Competing Perspectives

Two perspectives dominate the literature on differences in educational homogamy by union type: those based on economic theory and those emphasizing the strength of matching on cultural status into marriage. These two perspectives have opposite predictions for the resemblance of couples in the stocks and flows shown in Figure 1.

Specialization and trading. Hypotheses based on economic theory suggest that cohabitors will be *more* likely to be educationally homogamous than married couples (Brines and Joyner 1999; Schoen and Weinick 1993). According to a *specialization and trading* model, couples maximize the gains to marriage by specializing in realms in which they have a comparative advantage and by trading areas of advantage with their spouses (Becker 1973, 1981). Because cohabitation lacks the long-term commitment of marriage, cohabitors may be less likely to specialize than married couples. Instead, both partners are likely to contribute economically to the relationship and thus may both emphasize achieved characteristics in partner selection, such as earnings potential and education. Drawing on these ideas, Schoen and Weinick (1993) predicted that those entering cohabiting unions (transition 1 in Figure 1) should be more likely to be educationally homogamous than those entering marriage (transitions 3 + 4). To capture the gains to specialization, this perspective also implies that cohabitors who are educationally dissimilar should be more likely to marry than to dissolve their unions relative to homogamous cohabitors (transition 3 vs. 2)

and, once married, educationally dissimilar couples should be less likely to divorce than those who are homogamous (transition 5). These transitions would each tend to increase the resemblance of couples in the stock of cohabitors relative to the stock of marriages (box A vs. box B).

Extending this perspective, Brines and Joyner (1999) argued that different principles of cohesion bind cohabitors and married couples to their relationships. Cohabitors tend to be more egalitarian and individualistic yet less religious than married couples (Blumstein and Schwartz 1983; Clarkberg et al. 1995; Surkyn and Lesthaeghe 2004). Brines and Joyner (1999) hypothesized that the lack of institutional and legal protections available to cohabitors and their egalitarian beliefs foster relationships based on "equal power," whereas the "glue" that binds marriages is specialization. To the extent that education confers power to individuals in relationships, this hypothesis also suggests that those entering cohabiting unions (transition 1) should be more likely to choose educationally similar partners than those entering marriages (transitions 3 + 4), that educationally similar cohabitors should be more likely to remain together than to split up (transition 2), and that educationally dissimilar married couples should be less likely to divorce than homogamous couples (transition 5). Again, each transition would tend to increase the resemblance of the stock of cohabitors relative to married couples (box A vs. box B), resulting in higher odds of homogamy among cohabitors than marriages.

Cultural matching. Scholars drawing on economic theory have generally assumed that couples sort on education as a proxy for economic potential (Schoen and Weinick 1993), but education is multifaceted, also signaling values, attitudes, and class backgrounds. Thus, the high degree of educational homogamy found in marriage may largely be a reflection of the importance of matching on shared lifestyles and cultural backgrounds rather than economic potential (DiMaggio and Mohr 1985; Kalmijn 1994). A *cultural matching* hypothesis suggests that because marriage is a long-term commitment, matching on education and other measures of shared values and experiences—such as religion, age, and race/ethnicity—may be more important for marriage than cohabitation. The tendency to match on shared backgrounds may arise not only from individuals' own preferences but also as a result of the influence of others. Couples in relationships that cross educational boundaries may feel more comfortable cohabiting than marrying because of social pressure from their friends and family against the marriage (Casper and Bianchi 2002). These perspectives suggest that cohabitors will be *less* likely to be educationally homogamous than married couples.[1]

Although not explicitly linked, Blackwell and Lichter's (2000, 2004) "winnowing hypothesis" is consistent with the cultural matching hypothesis. They argue that "the statistical if not cultural norm is for individuals to sort themselves into marriages on the basis of similar ascribed (e.g., race) and achieved (e.g., education) characteristics" (2000:277). According to the winnowing hypothesis, cohabitation functions as a trial marriage that provides an additional selection venue to gain knowledge about potential mates. If cohabiting couples use less-stringent criteria for choosing their partners, they will tend to resemble each other less than married couples at the start of their unions (transitions 1 vs. 3 + 4) (Blackwell and Lichter 2004:721). Moreover, as couples move from cohabitation to marriage, educationally dissimilar couples will be more likely to split up (transition 2), and educationally homogamous couples will be more likely to marry (transition 3) (Blackwell and Lichter 2004:719–20). While Blackwell and Lichter's winnowing hypothesis focuses on differences in partner selection and selection out of cohabitation, the cultural matching hypothesis also has implications for selection out of marriage. Because of their potentially

1. Cohabitors may also be less likely to be educationally homogamous than married couples if couples sort on education as a proxy for economic potential and if the economic potential of *both* partners matters more in marriage than in cohabitation.

dissimilar lifestyles and beliefs, heterogamous married couples should also be more likely to divorce (transition 5). Each of these mechanisms would serve to increase the odds of homogamy in the stock of marriages relative to the stock of cohabiting unions (box B vs. box A), resulting in lower odds of homogamy among cohabitors than among married couples.

Previous Empirical Findings

When viewed from a stock-and-flow perspective, findings from previous literature provide little support for either of the two perspectives outlined earlier, although some consistent findings emerge. Most cross-sectional studies of the stocks of cohabiting and marital unions using U.S. data have found that cohabitors are less likely to resemble each other on education than married couples (Blackwell and Lichter 2000; Casper and Bianchi 2002; Spanier 1983), although others have found no difference by union type (Jepsen and Jepsen 2002).[2] The evidence on differences in partner choice is more inconsistent: using data from the late 1980s and early 1990s, some research has found that recently formed cohabiting unions were more likely to be educationally homogamous than new marriages (Schoen and Weinick 1993), whereas other research has found no difference (Qian 1998).

Previous research has consistently found little support for the notion that differences in the educational resemblance of cohabitors and married couples are generated by selective exits from cohabitation. Of the studies that have examined the joint education characteristics of cohabitors, three found no significant effects of educational differences on the likelihood of splitting up or marrying (Goldstein and Harknett 2006; Oppenheimer 2003; Sassler and McNally 2003), and one found that only cohabiting couples with large educational differences were more likely to separate than to marry (Smock and Manning 1997). There is also relatively consistent evidence that educationally dissimilar married couples have a higher likelihood of dissolution than do homogamous couples, which would tend to increase the odds of homogamy in marriage as dissimilar couples leave the stock of marriages (e.g., Clarkwest 2007; Goldstein and Harknett 2006; Kalmijn 1991; Tzeng 1992).

In sum, previous literature suggests that married couples may be more likely to be educationally homogamous than cohabitors in the stock of unions, but whether this is the result of differences in partner choice or selective exits from unions is unclear. What the results do suggest, however, is that marital dissolution may be a key factor in explaining any observed differences in homogamy. Yet, few studies of differences in educational homogamy by union type have incorporated selective marital dissolution into their analyses (Goldstein and Harknett 2006). The stock-and-flow framework adopted here allows for the investigation of each of these potential explanations for differences in homogamy by union type.

DATA

Overview

I use data from the National Longitudinal Survey of Youth (NLSY79) to examine educational homogamy in the stocks and flows of unions (Bureau of Labor Statistics 2002). The NLSY79 is a nationally representative sample of 12,686 American youth aged 14 to 21 as of December 31, 1978. Sample members were interviewed yearly beginning in 1979 through 1994 and then every other year since then. This article focuses on interviews from 1979 to 2002.

The NLSY79 consists of four subsamples: (1) a cross-sectional sample designed to be representative of American youth aged 14 to 21 as of December 31, 1978; (2) an oversample

2. See Hamplova (2009) for a description of how educational homogamy in the stocks of marriages and cohabiting unions vary across European countries. This article focuses on the United States, but whether a specialization and trading or cultural matching perspective best describes differences in the resemblance of couples by union type may vary across cultural contexts.

of Hispanic and black youths aged 14 to 21 as of December 31, 1978; (3) an oversample of poor nonblack, non-Hispanic youths; and (4) a military oversample. I exclude the latter two samples—the poor nonblack, non-Hispanic subsample and the military subsample—from the analysis because the vast majority were not interviewed after 1990 and 1984, respectively, and thus their marital histories are truncated. There are 9,763 respondents in the cross-sectional and black and Hispanic oversamples. Throughout the analysis, I use interview year–specific sample weights to correct for oversampling and nonresponse.

Advantages and Limitations of the NLSY79

The NLSY79 contains rich information on respondent's cohabitation and marital histories as well as spouse's and partner's educational characteristics throughout the interview period. An attractive feature of the NLSY79 is that it contains identifier variables for partners based on their names, which makes it possible to follow couples through multiple cohabitation and marital transitions over more than 20 years, even for those who changed partners between interview years. Other commonly used data sets with detailed cohabitation and marriage histories are not nationally representative, gather retrospective relationship histories, or have a shorter follow-up period. Furthermore, the NLSY79 cohabitation data correspond well to data from other sources (Oppenheimer 2003). As an additional check of the data, I corroborated my results with the 1979–2002 June Current Population Survey (CPS) where possible. In a supplement to this article available on the *Demography* Web site (http://www.populationassociation.org/publications/demography), I show that the results from the June CPS are very similar to those from the NLSY79, which demonstrates the comparability of the two data sources and bolsters confidence in the validity of the NLSY79 data.

A disadvantage of using the NLSY79 is that marriages and cohabiting unions that begin and end between interview years are missed because data on spouse's/partner's educational attainment and on respondent's cohabitation status are consistently available only at the time of the interview. Although short-term cohabiting and marital unions are present in the data if they correspond with the survey date, they will be underrepresented relative to cohabitations and marriages of longer durations. This problem is likely to be more severe for cohabiting than marital unions because they are typically of shorter duration. Later in the article, I investigate the extent to which the NLSY79 underestimates the prevalence of cohabiting unions relative to other data sources with more detailed cohabitation histories. In addition, I performed several sensitivity tests to assess the potential impact of the omission of short-term unions on my results. The results of these tests are presented in a supplement to this article on *Demography*'s Web site and suggest that my conclusions are unlikely to be affected by the omission of these unions.

Sample

To estimate differences in educational homogamy in the stock of unions by union type, I select a sample of marriages and cohabiting unions in which both partners are between 18 and 37 years of age at the time of the interview.[3] I include all cohabiting and marital unions regardless of their parity for comparability with previous research (Blackwell and Lichter 2000; Jepsen and Jepsen 2002).[4] The units of observation are couple-years, with one observation per interview year that respondents were in cohabiting or marital unions. Couple-years that contained missing or invalid information on the respondent's or partner's education were dropped (0.3% of married couple-years and 1.8% of cohabiting couple-years)

3. Restricting the sample to cases in which both partners are between 18 and 37 years of age effectively doubles my sample size and allows me to pool the female and male respondents. Thus, this sample is representative of couples in which one partner was between the ages of 14 and 22 in 1979, and in which both partners were between the ages of 18 and 37 between 1979 and 2002. The results are very similar to those presented here when partner's age is not restricted.

4. The results for first cohabiting and marital unions are similar to those for all unions.

unless these data could be imputed from information in adjacent interview years. The final "stocks" sample comprises 52,976 married and 8,144 cohabiting couple-years.

By using couple-years as the unit of analysis, I treat the NLSY79 as if it were pooled cross-sectional data. The couple-year analysis allows me to directly compare the results of my stocks analysis with cross-sectional results from prior research. To estimate differences in homogamy in the flows into and out of unions, I identify the five transitions shown in Figure 1.[5] Appendix Table A1 gives details on the identification of these transitions and their sample sizes.

Methods

I use log-linear homogamy models to describe differences in the educational resemblance of couples by union type. Homogamy models describe the association between couples' education characteristics in terms of the odds that male and female partners have the same rather than different educational attainments, and fit the data well relative to other single-parameter models.[6]

The data for the analyses are the cell counts of a contingency table produced by cross-classifying couple-years by male and female partner's years of schooling (<12, 12, 13–15, ≥16), female partner's age (18–21, 22–25, 26–29, 30–33, 34–37), and union type (marriage, cohabitation), which results in a $4 \times 4 \times 5 \times 2 = 160$-cell table. To model differences by union transition, I select couple-years in which a transition occurred and cross-classify couple-years by male and female partner's education and female partner's age.

DESCRIPTIVE RESULTS

To provide context for the log-linear model results and to assess the comparability of NLSY79 estimates with those from other sources, I use life-table methods to describe the cohabitation and marriage experiences of women in the NLSY79. Figure 2 shows the cumulative proportions of women who make each of the transitions outlined in Figure 1. Examining the magnitude of these flows is of particular importance here because their prevalence determines the extent to which particular transitions can affect differences in the resemblance between cohabitors and married couples. The NLSY79 cohort came of age during a time of rapid growth in cohabitation and high divorce rates. The relatively high volume of exits and entries from cohabitation and marriage are reflected in Figure 2.[7]

Turning first to entry into cohabitation, panel A of Figure 2 shows that by age 37, a large proportion (45%) of women in the NLSY79 had ever cohabited. This estimate is very similar to that reported by Bumpass and Lu (2000), who found that 48% of women aged 35 to 39 had ever cohabited in 1995, using data from the National Survey of Family Growth. Thus, despite missing short-term cohabiting unions that begin and end between interview years, the NLSY79 produces estimates that are comparable with those from surveys with more detailed cohabitation histories. Panel B of Figure 2 also shows that the vast majority (88%) of women had married for the first time by age 37, and that about one-third cohabited with their spouse prior to their first marriage (31%).[8] Here, the NLSY79 almost certainly underestimates the proportion of first marriages preceded by cohabitation with a spouse.

5. Educational upgrading after union formation may also contribute to differences in couple resemblance. Sensitivity tests assuming that partners maintain the same education throughout their relationships showed that the results are robust to educational upgrades after union formation.

6. In separate analyses, I examined more complex models that take into account gender asymmetries in matching and differences in couple resemblance by education level. Results from these models (available from the author upon request) indicate that homogamy is a good summary measure of differences in the resemblance of cohabitors and married couples.

7. The format of Figure 2 is adapted from Oppenheimer (2003).

8. Remarriages are somewhat more likely to be preceded by cohabitation than first marriages; 42% of couples entering remarriages cohabited with their partners prior to remarriage.

Figure 2. Transitions Into and Out of Cohabitation and Marriage

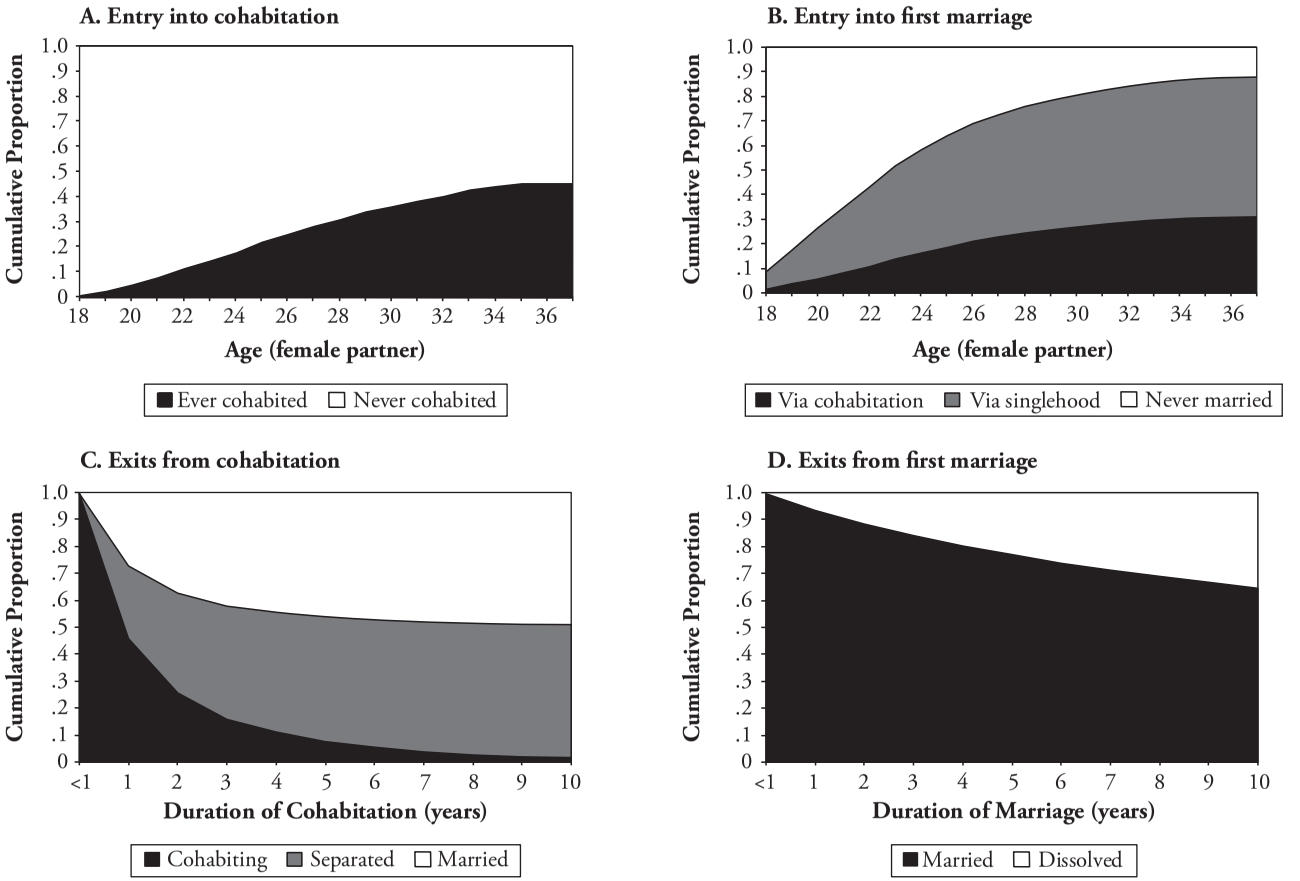


Table 1. Descriptive Statistics for Marital and Cohabiting Unions

	Prevailing Unions		New Unions	
Variable	Married	Cohabiting	Married	Cohabiting
Male Partner's Years of Schooling (%)				
<12	12.4	21.2	12.6	17.2
12	46.5	47.7	45.5	48.5
13–15	19.4	18.0	20.1	19.8
≥16	21.7	13.1	21.7	14.5
Female Partner's Years of Schooling (%)				
<12	10.4	18.2	10.7	16.4
12	47.1	49.4	45.9	48.7
13–15	22.5	20.1	23.5	20.8
≥16	20.0	12.3	19.9	14.1
Female Partner's Age (%)				
18–21	10.0	15.9	28.5	21.5
22–25	23.4	29.1	33.5	33.1
26–29	29.4	27.4	21.4	24.8
30–33	25.7	18.7	11.1	13.4
34–37	11.4	8.9	5.5	7.1
Educational Resemblance				
Homogamous (%)	54.9	50.7	53.5	51.3
Correlation	.60	.55	.59	.55
Sample Size	52,976	8,144	7,245	3,777

Note: Data are weighted.

Source: National Longitudinal Survey of Youth (NLSY79), 1979–2002.

A commonly cited statistic is that more than one-half the women who married in the early 1990s cohabited with their spouse prior to marriage (Bumpass and Lu 2000). Although this is a limitation of the NLSY79, as mentioned earlier, sensitivity tests showed that the underestimation of these transitions is unlikely to affect the log-linear model results presented in this article.

Like other studies, NLSY79 data indicate that cohabiting unions are short-lived (Bumpass and Lu 2000), with most cohabiting couples either splitting up or marrying within about one year (panel C). About one-half of cohabiting unions end as a result of a separation, and one-half end as a result of a transition to marriage. By contrast to exits from cohabitation, a much smaller proportion of marriages dissolve (panel D). After 10 years of marriage, 35% of first marriages ended, an estimate close to those from other surveys fielded around this time (Martin 2006). The high rate of exits from cohabitation compared with lower rates of exits from marriage results in a large difference in the duration of unions, with the median cohabiting union lasting about one year and the median marital union lasting about 16 years. Overall, the magnitude of entries and exits from cohabitation and marriage point to the potential importance of any of these pathways in accounting for differences in the odds of homogamy by union type.

To better understand the characteristics of these couples, Table 1 presents descriptive statistics for prevailing unions and newly formed unions by couple type. The prevailing union samples show that cohabitors tend to have less education than married persons and

that female cohabitors also tend to be younger than married women, results that are consistent with previous research (Bumpass and Lu 2000; Casper and Bianchi 2002). Cohabitors also tend to have less education than married persons when they begin their relationships, but women entering cohabiting unions are somewhat older than those entering marriage. Despite the fact that cohabiting women enter their unions at older ages, married women in prevailing unions are older than cohabiting women because marriages are typically of much longer duration.

Table 1 also shows that a greater percentage of married couples are educationally homogamous than cohabitors and that the correlation between married couples' educational attainments is higher. The greater resemblance of married couples is also apparent when couples begin their unions, but the difference in homogamy is somewhat smaller. These results provide initial support for the cultural matching hypothesis, which predicts that married couples should be more likely to be educationally homogamous than cohabitors, but the results should be treated with caution because percentages and correlations may be affected by differences in the education and age profiles of cohabitors and married couples. For example, if college graduates are more likely to be educationally homogamous than non–college graduates, the higher percentage of married couples who are college graduates could explain why married couples are more likely to be homogamous than cohabitors. The log-linear models used here control for differences in the educational attainments and ages of married and cohabiting couples. I also present results without controls for age because some previous studies have examined patterns of resemblance controlling for age (Goldstein and Harknett 2006; Qian 1998; Schoen and Weinick 1993), whereas others have not (Blackwell and Lichter 2000, 2004).[9]

LOG-LINEAR MODEL RESULTS

Table 2 presents the odds ratios of educational homogamy for different samples estimated from three sets of log-linear models, as well as a formal description of the models. It shows the ratio of the odds of homogamy for married couples relative to the odds of homogamy for cohabitors for (1) models that do not control the age of female partners (gross estimates), (2) models net of female partner's age, and (3) models by female partner's age.

Prevailing Unions

To examine the basic question of whether cohabitors or married couples are more likely to be educationally homogamous, I compare the odds of homogamy in the stock of prevailing marriages versus cohabiting unions (box B vs. box A in Figure 1). Figure 3 displays selected results from the log-linear models using the odds ratios given in Table 2.[10] Panel A of Figure 3 shows that both cohabiting and married couples are quite likely to be educationally homogamous, but married couples are more likely to be educationally homogamous than cohabitors: the odds of homogamy are 2.81:1 for married couples and 2.48:1 for cohabitors.

9. It would be possible to control for a host of other characteristics that may explain differences in the odds of educational homogamy by union type, such as race/ethnicity or earnings. The goal of this article, however, is to establish how transitions into and out of unions combine to affect the educational resemblance of couples in the stock of unions. As such, developing a detailed model explaining differences in educational homogamy is outside the scope of this article.

10. The odds ratios shown in Figures 3 and 4 were estimated by using the log-linear models described in Table 2. These equations do not produce interpretable coefficients for the odds of homogamy for the omitted union type (cohabitation) because of the inclusion of interaction terms for male and female partner's education in the models (λ_{ij}^{MF}). Rather than choosing an arbitrary point of comparison, I first estimate the log odds of homogamy for cohabitors by using modified versions of the models in which I replace the λ_{ij}^{MF} terms with a homogamy term (γ_{l}^{H}). Next, I calculate the log odds of homogamy for married couples by adding the difference in the log odds of homogamy for married couples versus cohabitors from the equations shown in Table 2 (γ_{kl}^{UH}) to the log odds of homogamy for cohabiting unions estimated from the modified equations (γ_{l}^{H}). The λ_{ij}^{MF} terms are included in the models because they greatly improve their fit; for similar models see Mare (1991) and Raymo and Xie (2000).

Table 2. Odds Ratios of Educational Homogamy by Sample

Sample	Model 1: Gross	Model 2: Net of Age	Model 3: By Female Partner's Age				
			18–21	22–25	26–29	30–33	34–37
Prevailing Unions (n = 61,120)							
Marriage vs. cohabitation	1.13*	1.13*	1.10	1.15†	1.11	1.14	1.13
	(2.31)	(2.19)	(0.96)	(1.86)	(1.24)	(1.29)	(0.82)
New Unions (n = 11,022)							
Marriage vs. cohabitation	1.06	1.02	0.98	1.06	1.00	0.93	1.26
	(1.21)	(0.47)	(0.20)	(0.78)	(0.02)	(0.55)	(1.13)
Cohabitation Exits and Marriage Entries (n = 9,160)							
Cohabitation to marriage vs. cohabitation dissolution	1.06	1.05	1.26	1.00	1.09	0.91	1.23
	(0.68)	(0.58)	(1.12)	(0.03)	(0.55)	(0.42)	(0.65)
Marriage without cohabitation vs. cohabitation to marriage	0.98	0.93	0.71*	0.96	1.00	1.05	0.94
	(0.29)	(1.04)	(2.03)	(0.33)	(0.03)	(0.25)	(0.23)
Marriage without cohabitation vs. cohabitation dissolution	1.04	0.98	0.90	0.95	1.09	0.95	1.15
	(0.54)	(0.32)	(0.76)	(0.39)	(0.60)	(0.24)	(0.49)
Marriage Exits (n = 52,976)							
Marital dissolution vs. persisting marriages	0.87**	0.86**	0.74**	0.79**	0.99	0.89	0.93
	(2.87)	(3.01)	(2.57)	(2.70)	(0.17)	(1.10)	(0.47)
Cohabitation Exits (n = 8,144)							
Cohabitation dissolution vs. persisting cohabiting unions	1.05	1.05	1.18	1.17	0.94	0.95	0.94
	(0.58)	(0.60)	(0.96)	(1.26)	(0.44)	(0.26)	(0.27)
Cohabitation to marriage vs. persisting cohabiting unions	1.06	1.04	1.18	1.13	1.10	0.71†	1.04
	(0.72)	(0.44)	(0.93)	(0.92)	(0.62)	(1.90)	(0.13)

Notes: See Appendix Table A1 for variable definitions. Data are weighted. Odds ratios of educational homogamy by union type were estimated using the following log-linear models:

$$\log(\mu_{ijkm}) = \lambda + \lambda_i^M + \lambda_j^F + \lambda_k^U + \lambda_{ik}^{MU} + \lambda_{jk}^{FU} + \lambda_{ij}^{MF} + \gamma_{kl}^{UH}$$

$$\log(\mu_{ijkm}) = \lambda + \lambda_i^M + \lambda_j^F + \lambda_k^U + \lambda_m^A + \lambda_{ik}^{MU} + \lambda_{jk}^{FU} + \lambda_{im}^{MA} + \lambda_{jm}^{FA} + \lambda_{km}^{UA} + \lambda_{ij}^{MF} + \lambda_{ikm}^{MUA} + \lambda_{jkm}^{FUA} + \lambda_{ijm}^{MFA} + \gamma_{kl}^{UH}$$

$$\log(\mu_{ijkm}) = \lambda + \lambda_i^M + \lambda_j^F + \lambda_k^U + \lambda_m^A + \lambda_{ik}^{MU} + \lambda_{jk}^{FU} + \lambda_{im}^{MA} + \lambda_{jm}^{FA} + \lambda_{km}^{UA} + \lambda_{ij}^{MF} + \lambda_{ikm}^{MUA} + \lambda_{jkm}^{FUA} + \lambda_{ijm}^{MFA} + \gamma_{klm}^{UHA},$$

where M is male partner's education (i = 1,…,4), F is female partner's education (j = 1,…,4), A is female partner's age (m = 1,…,5), U is union type (k = 1, 2), H = 1 if male partner's education category equals female partner's education category and 0 otherwise (l = 0,1), and μ_{ijkm} is the (weighted) expected number of unions between men and women with joint education ij among female partners of age m and union type k. For transitions, the union type terms are replaced with indicators for transition type.

Numbers in parentheses are $|z|$ statistics, corrected for respondent-level clustering (robust cluster option in STATA) using binomial and multinomial logit models that are equivalent to the log-linear models above but in which the units of analysis are couple-years rather than cell frequencies (Agresti 2002:330). For example, the logit equivalent of Model 2 is

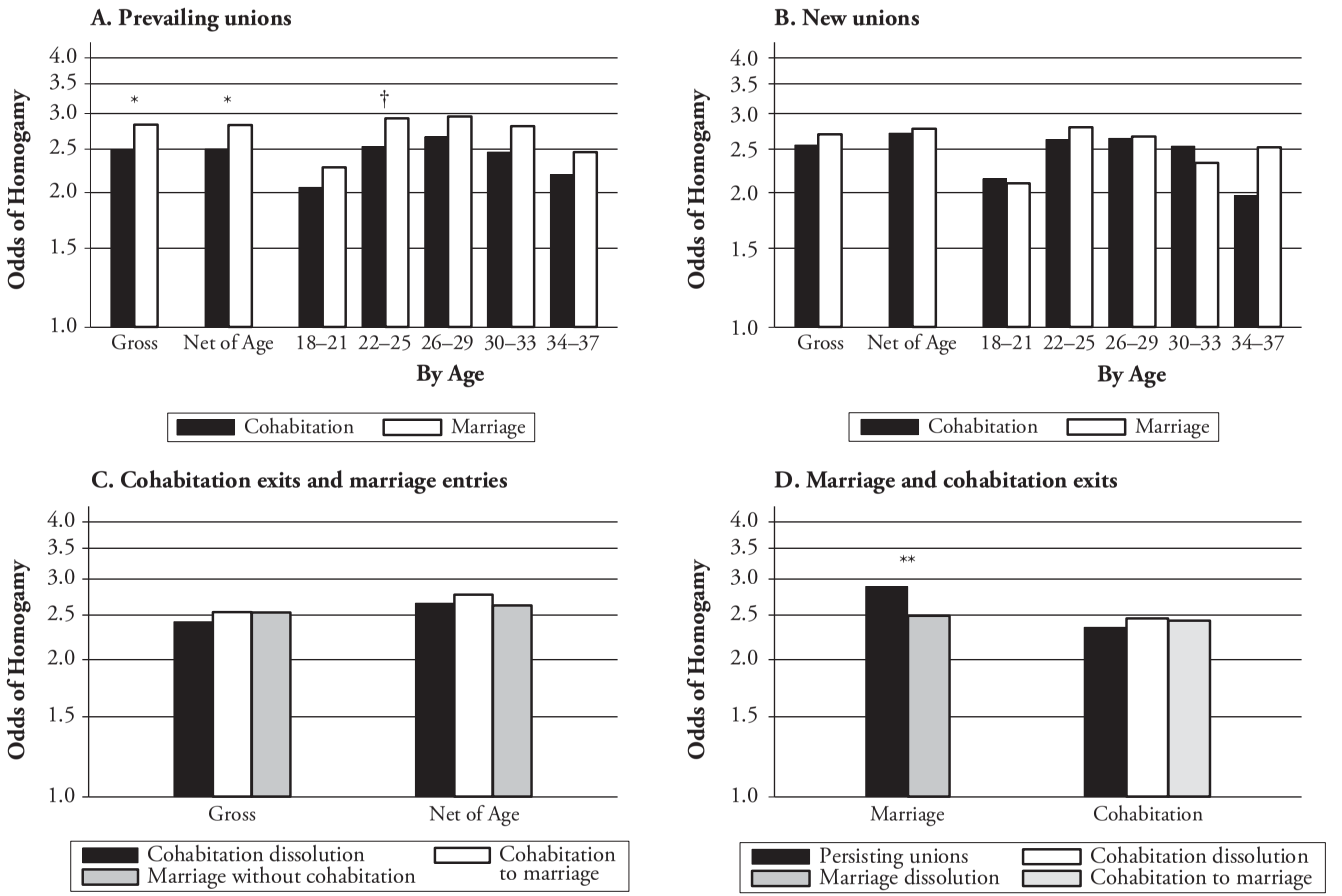
$$\text{logit}[P(U = 1 \mid M = i, F = j, A = m, H = l) = \alpha + \beta_i^M + \beta_j^F + \beta_m^A + \beta_{im}^{MA} + \beta_{jm}^{FA} + \delta_l^H.$$

Source: National Longitudinal Survey of Youth (NLSY79), 1979–2002.

†$p \leq .10$; *$p \leq .05$; **$p \leq .01$

The results for Model 1 in Table 2 show that the odds of homogamy among married couples are 13% higher than the odds among cohabitors (2.81 / 2.48 = 1.13; $p \leq .05$). This ratio is robust to controls for differences in female partner's age by union type (Model 2). At each age, the odds of homogamy among married couples are higher than for cohabitors, although many of these differences are not statistically significant largely because of relatively small sample sizes within age groups (Model 3).

Figure 3. Odds of Educational Homogamy by Sample



Note: Statistical significance levels for contrasts between groups are indicated as follows: $^{\dagger}p \leq .10$; $^{*}p \leq .05$; $^{**}p \leq .01$.

These results are consistent with previous studies that have used census and CPS data on prevailing unions (Blackwell and Lichter 2000; Casper and Bianchi 2002; Spanier 1983) and suggest that married couples in this cohort are more likely to be educationally homogamous than cohabitors. Nevertheless, both cohabitors and married couples show a strong tendency toward educational homogamy, and the absolute magnitude of these differences are modest.

New Unions

Are the observed differences in the odds of homogamy for cohabiting and married couples generated by differences in partner choice? To investigate this, I compare the odds of homogamy among newly formed marriages and cohabiting unions following Schoen and Weinick (1993) (transitions 1 vs. 3 + 4 in Figure 1). Panel B of Figure 3 shows few differences in the odds of homogamy at the start of marital and cohabiting unions. Controlling for age, Table 2 shows that the odds of homogamy among married couples are only 2% higher than among cohabitors (Model 2) and that none of the odds ratios by age are statistically significant (Model 3). Couples marrying in the oldest age category are more likely to be homogamous than new cohabiting unions, but a small percentage marriages in the sample began at this age (5%), and thus this odds ratio is not statistically significant.

These results are consistent with Goldstein and Harknett's (2006) finding that educational differences do not appear to be a barrier to marriage among cohabiting and dating couples, but the results are inconsistent with Schoen and Weinick's (1993) finding that newly formed cohabiting unions are more likely to be educationally homogamous than newlyweds. Our results suggest that differences in the odds of homogamy in prevailing marriages and cohabiting unions are not attributable to differences in partner selection.

Cohabitation Exits and Marriage Entries

Although differences in the odds of homogamy do not appear to be generated by differences in partner selection, a demographic winnowing process may still account for the greater resemblance of married couples if dissimilar cohabitors are more likely to split up than to marry. Likewise, if married couples who do not cohabit with their spouse prior to marriage are more homogamous than those who do, these differences may contribute to the greater likelihood of resemblance among married couples. Panel C of Figure 3 compares the odds of homogamy among (1) cohabitors who split up ("cohabitation dissolution," transition 2 in Figure 1), (2) married couples who cohabited with their spouse before marriage ("cohabitation to marriage," transition 3), and (3) married couples who did not cohabit with their spouse before marriage ("marriage without cohabitation," transition 4).

Both the gross estimates and those net of age reveal few differences in the odds of homogamy across these three transitions. The odds of homogamy among cohabitors who transition to marriage are slightly higher than for those who split up, but these odds ratios are not statistically significant. Thus, like other studies, I find little support for a winnowing process whereby homogamous cohabitors proceed to marriage and dissimilar cohabitors split up (Goldstein and Harknett 2006; Oppenheimer 2003; Sassler and McNally 2003).

Similarly, the odds ratios for married couples that cohabited before marriage versus those that did not are small and are not statistically significant. There is some evidence that young couples who cohabited with their spouse before marriage are more likely to be homogamous than those who did not (Table 2), but this cannot explain the higher odds of homogamy among marriages in prevailing unions apparent in Models 1 and 2.

Marriage and Cohabitation Exits

Thus far, results from the NLSY79 suggest that differences in the odds of homogamy by union type in prevailing unions are not due to (1) differences in partner choice, (2) differences between cohabitors who split up and those who marry, or (3) differences

between married couples who do and do not cohabit with their spouses prior to marriage. There are two remaining mechanisms that may generate the observed differences in the stocks. First, dissimilar marriages may be more likely to dissolve than those that are homogamous, leaving homogamous couples to accumulate in the stock of marriages. Second, cohabitors who end their unions by marrying or splitting up may be more likely to be homogamous than those who stay together, leaving heterogamous couples to accumulate in the stock of cohabiting unions.

To investigate these possibilities, I compare the odds of homogamy among cohabitors in the last year of their unions (transitions 2 and 3 in Figure 1) and married couples in the last year of their unions (transition 5) with those among cohabitors and married couples who are not in the last year of their unions—that is, those in persisting unions. Panel D of Figure 3 shows that couples whose marriages are about to dissolve are less likely to be homogamous than those in persisting marriages (estimates from models net of age). Table 2 shows that, net of age, the odds of homogamy among marriages about to dissolve are 86% of the odds among those that persist. By contrast, cohabitors who are about to exit their unions (either to marriage or singlehood) are slightly more likely to be homogamous than those in persisting cohabiting unions, although these odds ratios are small and are not statistically significant.[11]

Figure 4 provides additional evidence about the impact of selective exits from marriage and cohabitation, showing the odds of homogamy by union duration.[12] For unions less than one year old, there is a small and statistically insignificant difference in the odds of homogamy by union type; these estimates are identical to the gross estimates in Figure 3, panel B, and shown in Table 2 for new unions. The odds of homogamy among cohabiting unions that have not dissolved after one year are somewhat lower than those for newly formed unions. This reflects the selection of homogamous cohabitors out of cohabitation (both to marriage and to singlehood). Likewise, at each subsequent duration, prevailing cohabiting unions are less likely to be homogamous because homogamous couples are slightly more likely to marry and split up than to remain cohabiting. By contrast, the stock of marriages becomes somewhat more similar by duration as educationally dissimilar couples dissolve their marriages.

Figure 4 also shows that the odds of homogamy decrease faster among cohabitors than they increase among married couples. Although cohabitors who end their unions are only slightly more likely to be homogamous than those who remain (Table 2 and Figure 3, panel D), this result is not surprising given that the median duration of cohabiting unions is about one year, whereas the median duration of marital unions is about 16 years. These duration differences mean that the "outflows" of cohabitors (to marriage or to singlehood) in durations less than five years are vastly larger than the "outflows" of marriages (to dissolution) (see Figure 2, panels C and D). Because of the heavy volume of cohabitors exiting their unions, even a slight tendency for homogamous cohabitors to end their unions can have a nontrivial impact on their odds of homogamy. By contrast, fewer marriages dissolve than cohabiting unions, which dampens the impact of selective marital dissolution on the odds of homogamy in the stock of marriages.[13]

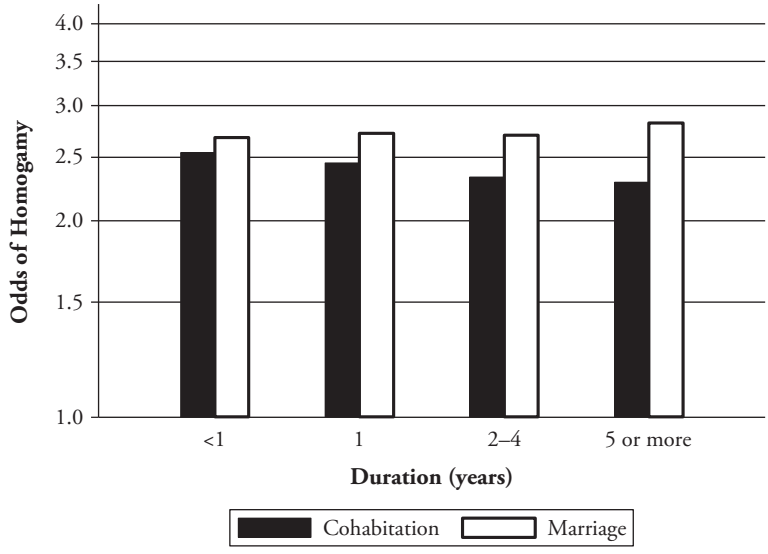
To summarize, although there are small and statistically insignificant differences in the odds of homogamy when cohabitors and married couples enter their unions, these initial

11. Discrete-time hazard models of exits from marriage and cohabitation produce very similar results to those shown here.

12. These results were estimated from a log-linear model that is identical to Model 3 as defined in Table 2, but replaces female partner's age with union duration.

13. The results shown in Figure 4 are not due to panel attrition. For this to be the case, attrition would need to be higher among homogamous than heterogamous cohabitors and higher among heterogamous than homogamous married couples. Logistic regression results show no evidence that this is the case, and results from analyses excluding relationship spells that are censored by panel attrition are very similar to those presented here.

Figure 4. Odds of Educational Homogamy in Prevailing Unions by Union Type and Duration (years)



differences are magnified by selective exits from marriage and cohabitation. For a given cohabiting couple, crossing an educational boundary makes little difference for whether partners marry, split up, or remain cohabiting. But at the population level, the massive movement of cohabitors out of their unions combined with the slightly higher educational resemblance of cohabitors who marry or split up contributes to differences in the odds of homogamy by union type. By contrast, for a given married couple, crossing an educational boundary is associated with a higher likelihood of marital dissolution, a process that also contributes to differences in the odds of homogamy by union type by increasing the odds of marital homogamy as a result of the exit of dissimilar couples from the stock of marriages.

DISCUSSION

This article examines differences in educational homogamy in cohabitation and marriage from a stock-and-flow perspective, and in so doing, shows how many of the disparate findings of past research are part of a coherent process of assortative cohabitation and marriage. Specifically, I show how studies that use cross-sectional data on the stocks of unions, which have generally found that married couples are more likely to be homogamous than cohabitors (e.g., Blackwell and Lichter 2000), are consistent with other research that has found no difference between recently formed marriages and cohabiting unions (Qian 1998), and studies that have found no difference between cohabitors who split up and those who marry (Goldstein and Harknett 2006; Sassler and McNally 2003). The results suggest that the small and statistically insignificant tendency for homogamous cohabitors to exit their unions combined with the more pronounced tendency for dissimilar married couples to split up largely account for differences in the odds of homogamy by union type. Additional research is needed to determine the sources of other discrepancies in the literature—for example, the finding that newly formed cohabiting couples are more likely to resemble one another on education than are newly married couples (Schoen and Weinick 1993).

Regardless of the precise sources of the discrepancies, however, these findings illustrate the difficulties researchers face when attempting to draw conclusions about mechanisms that generate differences between groups from cross-sectional data, and echo findings from past studies suggesting the fruitfulness of a stock-and-flow perspective for problems in which multiple flows affect cross-sectional differences between groups (e.g., Kenney and McLanahan 2006; Klerman and Haider 2004; Quillian 1999).

In addition to presenting new findings on an empirical question upon which there has been considerable disagreement, this study has implications for competing hypotheses about differences in the educational resemblance of cohabitors and married couples. The findings are inconsistent with hypotheses drawn from economic theory, which predict that cohabitors will be more likely to choose educationally similar partners than those who marry. Thus, it appears that cohabitors' greater emphasis on egalitarianism and economic equality (Brines and Joyner 1999) does not translate into greater educational homogamy in this cohort. Indeed, these results suggest that sorting on education is more similar to sorting on ascribed characteristics, such as race/ethnicity, religious background, or age, characteristics for which married couples tend to be more alike than cohabitors (Blackwell and Lichter 2000, 2004; Jepsen and Jepsen 2002; Schoen and Weinick 1993), than to sorting on achieved characteristics, such as earnings and employment. One reason for this finding may be that education is more difficult to change than earnings and employment. Couples who are both employed while dating or cohabiting often adopt a specialized division of labor upon marriage when wives scale back their labor force participation (Drobnič, Blossfeld, and Rohwer 1999). However, a similar mechanism is not possible for education; educationally homogamous couples cannot become dissimilar via the reduction of one partner's educational attainment.

Instead, these results are more consistent with the cultural matching hypothesis, but not for the reasons that are commonly hypothesized. Scholars generally argue that if cohabitation is trial marriage, cohabitors will be more likely to partner with dissimilar mates and split up with these partners prior to marriage (e.g., Blackwell and Lichter 2000, 2004). I find little evidence that cohabitors are more likely to choose educationally dissimilar partners or that educationally dissimilar couples avoid marriage in favor of cohabitation. One interpretation of these results is that relationships that cross educational lines are not particularly nonnormative. The high levels of educational homogamy for both marriages and cohabitating unions may simply be a reflection of similar opportunities to meet potential mates in partner markets that are partially structured by education. Alternatively, it may be that heterogamy is equally nonnormative for both those entering cohabiting and marital unions and that sorting occurs prior to entry into either of these relationships (Blackwell and Lichter 2004).

Where the potential difficulties associated with educational interrelationships may be evident, however, is in patterns of marital dissolution. I find that marriages that cross educational lines are significantly more likely to dissolve than homogamous marriages, which is a result consistent with past research (e.g., Clarkwest 2007; Goldstein and Harknett 2006; Tzeng 1992). The finding that educational differences are associated with a greater likelihood of union dissolution for married couples but not for cohabitors poses an interesting puzzle. Why would educational differences matter for the stability of marital unions but not for cohabiting unions? One explanation is that cohabitors are simply not in their relationships long enough for educational differences to cause problems, but that the problems associated with educational differences develop over time (Goldstein and Harknett 2006). Another explanation points to the possible ineffectiveness of cohabitation as a trial marriage. Educational differences may not become problematic until couples encounter the unique experiences and expectations associated with marriage. For example, conflict from educational differences may arise from disagreements about raising children or the allocation of joint resources—issues that are more likely to arise in marriage than in cohabitation

(Blumstein and Schwartz 1983; Raley 2001). Alternatively, educational differences may, in fact, be problematic for cohabitors, but because of relationship momentum and the accumulation of relationship-specific investments, cohabitors in these relationships may "slide" into marriage (Dush, Cohan, and Amato 2003; Stanley, Rhoades, and Markman 2006). In either case, these findings are consistent with a large body of research on cohabitation and divorce questioning the effectiveness of cohabitation as a trial marriage in which the "bad matches" split up and the "good matches" marry (e.g., Dush et al. 2003; Lillard, Brien, and Waite 1995; Stanley et al. 2006; but see Elwert 2007).

Finally, this study provides a basis for speculation about the implications of the rise of cohabitation for studies of assortative mating that rely exclusively on marriage data. Research on trends in the educational resemblance of spouses have generally found that educational homogamy has increased since the 1960s (e.g., Kalmijn 1991; Qian and Preston 1993; Schwartz and Mare 2005; but see Rosenfeld 2008). Increases in cohabitation may have contributed to this trend if cohabitation "weeds out" educationally dissimilar couples before marriage. I find little evidence for this hypothesis, however, among a cohort of Americans forming unions largely in the 1980s and 1990s. Of course, this article examines these patterns for only one cohort. Cohabitation may have performed more of a screening role in the past whereby dissimilar couples split up and homogamous couples married. However, only 8% of marriages were preceded by cohabitation in the late 1960s (Bumpass 1990), which means that the potential impact of such a screening effect would most likely have been small. Moreover, past research on historical trends in the educational resemblance of pooled samples of cohabiting and marital unions differ little from trends in marital unions alone (Qian and Preston 1993:492). Taken together, this evidence suggests that cohabitation is unlikely to have been the driving force in the upward trend in the educational resemblance of spouses. Future research should investigate this question directly.

Appendix Table A1. Variable Definitions and Sample Sizes, NLSY79 1979–2002

Measure	Definition	*n*
Prevailing Marriage	Interview years in which respondents report being married.	52,976
Prevailing Cohabiting Union	Interview years in which respondents report cohabiting.	8,144
New Cohabitation	Cohabiting unions formed within two years of the current interview. Measured in the interview year in which they first appear in the data.	3,777
Cohabitation Dissolution	Cohabiting unions in which the respondent is not living with the current partner in the next interview year. Measured in the interview year in which the couple last appears in the data prior to separation.	1,915
Marriage to Cohabiting Partner	Marriages formed within two years of the current interview in which respondents were cohabiting with their current spouse in the previous interview year. Measured in the first interview year after marriage.	1,529
Marriage Without Cohabiting With Spouse	Marriages formed within two years of the current interview in which respondents were not cohabiting with their spouse in the previous interview year. Measured in the first interview year in which they appear in the data.	5,716
Marital Dissolution	Married couples who are separated, divorced, or widowed in the next interview year. Measured in the interview year in which they last appear in the data prior to marital dissolution.	3,275

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