

Marrying Up by Marrying Down:

Status Exchange between Social Origin and Education in the United States

Introduction

The idea that marriages across social boundaries may be based on an exchange of future economic prospects, beauty, racial status, domestic skills, or some other trait desirable is known as status exchange. The research on status-exchange marriage in the U.S. has primarily focused on the exchange of racial status and class. It is believed that whites of relatively low socioeconomic status (SES) marry blacks of higher SES in an exchange of racial caste position for economic resources and status, but this hypothesis has received mixed support in the literature (see Kalmijn 1993; Qian 1997; Fu 2001; Rosenfeld 2005; Gullickson 2006; Fu 2008). One reason that status exchange may not be consistently found with respect to race and SES is that race is not strictly hierarchical. Both whites and blacks may prefer racial endogamy to intermarriage. If this is true, then intermarriages between low-SES whites and high-SES blacks may be a status exchange for whites, but not for blacks. As a result, high-SES blacks will not have an incentive to marry low-SES whites, and exchange marriages will not take place.

The premise that people generally prefer partners of higher status to those of lower status is more tenable with respect to social origin than race. We examine the exchange of social origin (i.e., parental socioeconomic status) and own educational attainment in the U.S. Homogamy by education is one of the most prominent patterns of marital assortment (e.g., Mare 1995; Schwartz and Mare 2005). Previous studies have also documented spousal similarity with respect to parental characteristics such as father's occupational class (Kalmijn 1991) and parental wealth

(Charles, Hurst, and Killewald 2001). However, researchers have not yet studied the exchange of social origin and educational attainment in the U.S. When spouses match on their educational attainments and social origins, social hierarchy is perpetuated; intermarriage across socioeconomic boundaries promotes social mobility. But what rules govern socioeconomic intermarriages? Do highly educated men and women with low-SES parents use their education to marry the children of high-SES parents who have lower education themselves?

Theories of Status Exchange

Status exchange marriage can be explained from two theoretical perspectives. The social exchange theory views marriage as an exchange of a man and a woman's resources (Edwards 1969). As in all contractual dyadic relationships, people seek to maintain equity between their inputs into, and outcomes from, marriages. As a result of the equity norm, marriages are more likely and stable between men and women with similar resources. When one party has significantly more resources than the other, the party with more resources may feel that the marriage is "unfair," while the party with fewer resources may suffer from low self-esteem and insecurity. The resources being exchanged, however, need not be of the same kind. Indeed, they are often different because different traits are valued in men and women. Therefore, we would expect exchanges of different resources between partners.

Status exchange can also be explained as an outcome of marriage market competitions (e.g., Kalmijn 1998). From this perspective, men and women "bid" for their favorite partners; the "prices" they offer are their own traits. There are two distinct patterns of preferences--preference for higher status, and preference for similar status. As long as most people prefer similar or

higher status to lower status, the demand for higher-status partners will be greater than that for lower-status partners. As a result, men and women of higher “trade values” will pick their preferred mates first, and those of lower trade values are left to choose among themselves. Because a person’s trade value depends on the endowments in multiple traits, a disadvantage in one trait can be compensated for by an advantage in another. Thus, for any given pair of traits, exchange marriages should be more likely than marriages where one partner has a relative advantage in both traits. In other words, *there should be a negative correlation between spousal differences in two traits.*

Data and Methods

Our statistical analysis draws on data from the 1968-2007 Panel Studies of Income Dynamics. To minimize selection bias due to divorce, we limit to marriages less than 2 years old. Educational attainment is coded as a categorical variable with seven intervals. Social origin is measured as the total years of schooling of both parents, also collapsed into 7 categories. After cases with missing data are dropped, we have a total of 6253 couples for analysis.

We conduct our statistical analysis in three steps. First, we examine pairwise correlations and partial correlations of husband’s education, husband’s origin, wife’s education, and wife’s origin. The goal of this analysis is to confirm the pattern of homogamy by education and social origin. Second, using descriptive statistics, we compare the percentage of educational hypergamy for marriages where the husband is of (a) lower status, (b) equal status, and (c) higher status in social origin than the wife. The goal is to demonstrate the logic of testing the exchange hypothesis. Finally, to formally test the exchange hypothesis, we estimate log-linear models

similar to those used in Rosenfeld (2005), Kalmijn (2010), and Gullickson and Fu (2010). In so doing, we comment on methods used by previous studies.

Like previous research, we find that people select partners based on their parents' characteristics as well as their own. In addition, our results indicate that when people marry up in social origin (education), they tend to offer a relative advantage in education (social origin). The pattern holds true for both men and women and is robust to model specifications of assortative mating pattern by education and social origin. This suggests that people use their parents' social position as leverage to obtain a better match than they may have otherwise made based on their achieved traits, and the other way around. More broadly, our research points to the importance of social background, not only for individual's own educational attainment and success, but in shaping the family characteristics of the next generation.

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