Endogamy and Social Class in History: An Overview*

MARCO H.D. VAN LEEUWEN AND INEKE MAAS

INTRODUCTION

The social identities of marriage partners [...] are among the most sensitive and acute indicators of community or class feelings. Who marries whom, without courting alienation or rejection from a social set, is an acid test of the horizons and boundaries of what each particular social set regards as tolerable and acceptable, and a sure indication of where that set draws the line of membership.¹

It took a marriage to reproduce a class structure, or to alter it, as Thompson claimed for England in the nineteenth century. Kocka too, in his study of class formation in Germany, noted that the essence of class formation is the process of simultaneous closure of marital barriers between certain social groups and the blurring of barriers between others.²

Given the importance for social history of marriage patterns by social class, it is remarkable that historians have studied endogamy by region and age much more than endogamy by social class.³ Endogamy by social class is also known as social endogamy or social homogamy (we use the terms interchangeably here, although, strictly speaking, social endogamy refers to marrying within the same class – and thus assumes the existence of a limited number of discrete classes – while social homogamy refers to marrying someone of approximately the same status – and thus assumes the existence of a continuous status scale). Scholars from other disciplines, notably sociology, have written more on social endogamy. Sociologists

* We are grateful to Jos Dessens, Chris Gordon, Wim Jansen, Jan Kok, Frank van Tubergen, Lex Heerma van Voss, Richard Zijdeman, and members of the editorial committee of this journal for their comments.


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have dealt with contemporary patterns and their determinants to a greater degree than with the long-term historical trends that escape survey data. Nonetheless, their valuable work – notably on the determinants of social endogamy – can be usefully consulted, since it yields insights that can be tested against the historical record, thus furthering our understanding of processes of class formation in the past and also establishing, or questioning, the validity of theoretical notions.

By and large, a few groups of key questions recur in the literature on marriage and social class, and, for that matter, in much of the literature dealing with social inequality. One set of questions in the literature on endogamy by social class focuses on geographical and temporal variations in patterns of endogamy. Were there regional differences in who married whom, and did these change over time? If so, did these regional patterns converge or diverge? A second set of questions focuses on determinants of endogamy. What factors determine who marries whom? And has the relative importance of these factors changed over time? A third set of questions relates to the durability of social inequality, as measured by the mobility a society allows it members.

Stratification sociologists often look at the degree of intergenerational class mobility, or indeed of marital mobility, to judge the “social fluidity” or “openness” of a society. Equipped with such information, it is possible to look at a fourth and final set of questions on the consequences of differences in processes of class formation for social and political relationships. One can speculate, for example, to what extent major differences between countries in patterns of inequality, labour relations,

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and social unrest can be explained by differences in social stratification and class mobility. This type of question has been posed notably with regard to intergenerational mobility, but it can also be asked with regard to marriage patterns according to social class. For example, from Karl Marx and Werner Sombart onward, scholars have attributed the absence of a large socialist party in the United States — in contrast to many European countries — to the greater permeability of social class boundaries there. 5

Given the importance of social endogamy for social and labour history, it is fortunate that so many scholars have contributed to the present volume. Each contribution is a case study that sheds light on a number of key questions. The findings are much more comparable than was previously the case in this type of research, since all the contributors have used the same social-class scheme. This also makes it possible to undertake a comparative analysis of the data underlying these case studies (see the conclusion to this volume). Is it a permissible exaggeration to claim that these studies mark the commencement in earnest of the global comparative study of partner choice according to social class in the past? 6

A prime reason why no comparative study on this central theme in social history has hitherto appeared is the fact that until recently it was impossible to allocate the same occupations in different regions and


languages to the same classes. This problem has recently been tackled by developing two comparative tools: HISCO and HISCLASS. Both HISCO, the standard occupational coding scheme, and HISCLASS, the social-class scheme based upon HISCO, were conceived to meet the need to find a way to undertake international social mobility analysis. Both the coding and the social-class scheme can, however, be used for many other purposes. Occupations form the heart of the world of work, and the world of work is central to social and labour history.

All the contributions to this volume have used the same social-class scheme – more information on HISCLASS is presented in the various contributions as well as in the conclusion to this volume – and as a result their findings can be compared. These contributions cover the past three centuries, with a focus on the nineteenth century, and they take in large or small parts of Austria, Belgium, Brazil, France, the Netherlands, Norway, Sweden, and Switzerland. While this coverage is heavily biased towards Europe, one of the essays in this volume thus deals with a Latin American society.

Social homogamy in the past can be studied using historical sources, notably censuses and vital registration data, including marriage certificates, which are available not just in Europe but also in other parts of the world. Both HISCO and HISCLASS can be used as instruments of global history and have already been tested and applied in different parts of the globe. We hope, therefore, that this volume will be seen as an invitation to historians and other scholars around the world. Even as it is, these essays cover a wide range in terms of chronology and subject: Belgium, the

7. The issue of the non-comparability of the various historical studies on social mobility has been raised, for example, in H. Kaelble, Historical Research on Social Mobility: Western Europe and the USA in the Nineteenth and Twentieth Centuries (London, 1981), and idem, Social Mobility in the 19th and 20th Centuries: Europe and America in Comparative Perspective (Leamington Spa, 1984).
8. Marco H.D. van Leeuwen, Ineke Maas, and Andrew Miles, HISCLASS: Historical International Standard Classification of Occupations (Leuven, 2002); idem, “Creating an Historical International Standard Classification of Occupations (HISCO): An Exercise in Multi-National, Interdisciplinary Co-Operation”, Historical Methods, 37 (2004), pp. 186–197; M.H.D. van Leeuwen and I. Maas, “HISCLASS”, paper presented at the 3rd European Social Science History Conference (Berlin, 24–27 March 2004). See too the individual contributions and the conclusion to this volume for more information on HISCO and HISCLASS, as well as the History of Work Website mentioned below. These three projects originate with the long-established research project HISMA (Historical International Social Mobility Analysis).
9. The History of Work website of the International Institute of Social History (see http://historyofwork.iisg.nl) contains occupational titles coded into HISCO from the following countries: Belgium, Brazil, Canada (Quebec), Finland, France, Germany, Greece, The Netherlands, Norway, Portugal, Spain, Sweden, UK, and Switzerland. Work on coding occupations in other countries, such as India, Italy, Russia, and the Philippines is currently underway. See, for example, V. Vladimirov (ed.), Istoricbeskor professiovedenie. Sbornik nauchnih statie (Barnaul, 2004).
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leading industrial nation outside Britain; France, which has experienced many major social and economic transformations over the past two centuries; traditional Nordic farming communities; a mountain community (in Austria); and a slave-owning society (Brazil). This wide variety may provide a window on regional and temporal variations in social endogamy and a testing ground for theories on its determinants.

DETERMINANTS OF SOCIAL ENDOGAMY

Determinants of social-class endogamy can be clustered in various ways. A threefold division between individual preferences, third party influences, and the structural constraints imposed by the marriage market is often used. We will use the same framework, although we distinguish a total of five clusters. The first and second group of determinants deals with the marriage market. A distinction is made between factors influencing the likelihood of encountering marriage candidates in a given locality, at least long enough to have some sense of whether they would be suitable spouses, and factors dealing with the degree to which geographical marriage horizons shrank or expanded. A third cluster relates to the social pressure from parents, peers, and the community favouring partners from some social classes and rejecting others. The fourth group concerns personal autonomy – the degree to which one can resist such pressure. And, finally, there is a fifth group, that of personal preferences.

Likelihood of meeting on the marriage market

The opportunity to meet a potential spouse is often seen as an important factor explaining why people marry individuals similar to themselves. The marriage market is limited to certain contexts, for example to the neighbourhood where one lives, and these contexts are to some extent already socially homogenous. Thus people end up marrying people similar to themselves even if they have no special desire to do so. The likelihood of meeting may be dissociated into two components: the likelihood of meeting within a certain geographical region, and the likelihood as a function of the size of that region – in other words the “marriage horizon”. We begin with a discussion of the first component.

Mating requires meeting. In the contemporary world, young people might meet at kindergarten, at family gatherings, at school, in the neighbourhood, at church, through sports clubs and other associations, during public celebrations, leisure activities, work, and on the Internet – to list but a few of the more important meeting places that exist. It has been said that, today, school and work are more important in producing socially homogamous marriages than family networks are, and that neighbourhoods do not seem to have this effect.\textsuperscript{12}

Young people spend a large part of their youth at school, and thus the people they meet at school form an important pool of those they get to know well enough to consider forming a relationship.\textsuperscript{13} Schooling has of course increased dramatically in virtually all countries in the world over the past two centuries. Primary education has become compulsory in many countries, raising participation rates to extremely high levels. More importantly for endogamy, access to secondary and tertiary education – where participants might begin to look for a partner – has generally increased and in many countries become more universal, covering the whole spectrum of society to a larger degree than was formerly the case. One would expect this to lead to higher rates of exogamous marriage, the more so the older the age at which children are stratified into different school levels.\textsuperscript{14} Furthermore, many leisure activities are in some way connected with school,\textsuperscript{15} either because schools organize them – compulsory swimming classes for example – or, for example, because children from the same school support the same football team (perhaps more so today than in the past). Even if they are not organized by schools, leisure activities are important meeting places for adolescents – all the more so if both boys and girls are actively involved.

The effect of educational expansion has actually been even greater than one might suppose. Whereas schools in Europe in the eighteenth and nineteenth centuries instructed children in the virtues of class immobility,\textsuperscript{16} they did so to a lesser extent in the twentieth century. It has been argued that pupils who were taught non-conservative values were

\textsuperscript{12} Kalmijn and Flap, “Assortative Meeting and Mating”.
\textsuperscript{13} At least in the case of co-educational schools.
\textsuperscript{14} See Jutta Allmendinger, Career Mobility Dynamics: A Comparative Analysis of the United States, Norway, and West Germany (Berlin, 1989).
more likely to develop an appetite for non-traditional marriages. However, important differences might have existed between countries such as Britain – with a higher degree of class-specific education, due to the existence of expensive “public” schools – and the Netherlands – where education was less influenced by class and more influenced by religious-based divisions.

Many people find their spouse at work, and in this respect the varying and historically changing forms of the labour market will have had an impact on endogamy patterns, although as yet we know very little about how this worked. A young man employed at a small workplace will meet fewer women than one working in a large factory or a modern institution such as a post office or a bank, where not only are the “birds” more numerous, they are also of a different feather. The rise of industry and of other large, meritocratic internal labour markets from the mid-nineteenth century onwards led thus, ceteris paribus, to a higher likelihood of marrying outside one’s social class. Other developments in the labour market, such as changes in labour-related migration patterns, might also have influenced social homogamy.

In cities, the social composition of neighbourhoods is another factor influencing marriage patterns by social class, because many people marry someone living close by. So even if they have no intention of marrying within their own class, many will nonetheless do so if their neighbourhood consists of people working in the same trade or type of factory, for


19. In the case of an increase in seasonal migration, for example, one would expect a decrease in homogamy according to social class. For a survey of migration in Europe, see Leslie Page Moch, Mowing Europeans: Migration in Western Europe since 1650 (Bloomington, IN, 1992). In societies where it was common for girls to seek employment elsewhere as a servant before marriage, such service could broaden the marriage horizon, not just geographically but also socially, as the girls acquired the social and other skills valued in the social circles of their employers; perhaps the girls also developed a taste for another way of life. See L. Broom and J.H. Smith, "Bridging Occupations", British Journal of Sociology, 14 (1963), pp. 321–334; T. McBride, "Social Mobility for the Lower Classes: Domestic Servants in France", Journal of Social History (1974), pp. 63–78; H. Brus, Zeeuwse meisjes. Dienen in de levensloop van vrouwen, ca. 1850–1950 (Amsterdam 2002). A decrease in service over time would, in that case, mean an increase in social homogamy, while an increase in service would mean the opposite.
example. Over the past two centuries, a growing share of the world’s population has lived in cities; currently, for the first time in history, more people now live in urban areas than rural areas. The social composition of urban districts might thus have had a considerable impact on social endogamy worldwide.

We know very little about long-term changes in spatial social segregation in cities, however. It is thus possible, for example, that in some cities neighbourhoods were more alike two centuries ago (with spatial segregation within wards being more prevalent than between wards, with, for instance, the upper classes living on the main streets, the middle classes on side streets, and the poor on side streets of side streets) than today (with a few rich neighbourhoods, a large number of mixed neighbourhoods, and mostly poor neighbourhoods). If so, then for those cities the changes in spatial social segregation will have increasingly favoured social endogamy, all other things being equal. We cannot tell, however, in which cities such a process has occurred.

The likelihood of meeting a partner from a particular social group also depends on the size of the various social groups and on their degree of geographical isolation. If meeting is a random phenomenon, the chances of meeting someone from a particular social class are the product of the relative size of one’s own group and the relative size of the other social class. The more heterogeneous a population, the lower the chances of meeting someone from the same social class. If meeting implies mating – which of course it does not invariably – a higher degree of social heterogeneity would imply more exogamy. It is not just the sizes of the various social groups that matter; so too does the degree to which they live in geographical isolation. The chances of marrying a coastal fisherman are obviously less for a woman living inland than for one living on the coast, and the likelihood of marrying a farmer is greater for farmers’ daughters (since they too live in the countryside) than it is for either coastal inhabitants or urban dwellers.

Further, a population that is religiously (or ethnically) heterogeneous is more likely to be socially exogamous because prospective marriage candidates are selected first on the basis of religion (or ethnicity), thus leaving fewer, if any, marriage partners in the same social group. This


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would lead one to expect that a country that is more religiously (or ethnically) diverse would have higher exogamy than a country that is less diverse, and that a country that becomes more diverse in the course of time will witness an increase in the proportion of exogamous marriages.

Geographical marriage horizons

The likelihood of finding a suitable marriage partner depends not only on the degree to which one becomes acquainted with the possible marriage partners in a region but also on the changing boundaries of what constitutes a region. A great many studies, on all parts of the globe, have demonstrated that most people tend to marry someone living close by.22 On foot in accessible terrain – that is, no mud, rivers, mountains, and gorges – one can perhaps walk 20 kilometres to another village and walk the same distance back on the same day. This distance comes close to the limit of trust that separated the known universe from the “unsafe” world beyond. If marriage “horizons” expanded, young suitors would be able to meet more potential marriage partners. The increase in the means and speed of transportation brought about by new and improved roads and canals, and by new means of transport such as the train, the bicycle, the tram, and the motorcar brought a wider range of potential spouses within reach. These new means of transport increased the distance one could travel during the same day, and thus expanded the geographical marriage horizon.23

In the course of the past two centuries, the average unmarried citizen


23. J. Millard, "A New Approach to the Study of Marriage Horizons", Local Population Studies, 28 (1982), pp. 10–11. Rosental sets the limit at 25 km; see Paul-André Rosental, "La migration des femmes (et des hommes) en France au XIXe siècle", Annales de Démographie Historique, 1 (2002), pp. 107–136, esp. p. 109. Frans van Poppel and Peter Ekamper suggest a lower limit of 20 km in "De Goude horizon verruimd. Veranderingen in de herkomst van Goudse bruiden en bruidegoms", in J. Kok and M.H.D. van Leeuwen (eds), Generatieën en gelegenheid. Twee eeuwen partnerkeuze en huwelijk (Amsterdam, 2005). Kok and Mandemakers found that the degree to which a town or village was isolated had an effect on the degree of social homogamy; see Jan Kok and Kees Mandemakers, "Vrije keuze uit een beperkt aanbod. De huwelijksmarkt in Utrecht en Zeeoland, 1840–1940", in Kok and van Leeuwen, Generatieën en gelegenheid. For a discussion of the effect of changes in transport on migration, see, for example, Collin Pooley and Jean Turnbull, Migration and Mobility in Britain since the 18th Century (London, 1988), pp. 64–71 and 303–306.
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will have met more marriage partners from his own social class and from other classes than previously. He or she will also have engaged more frequently in the gentle art of writing love letters. In the past two centuries the number of letters and postcards written per head of the population increased greatly.²⁴ In a more recent phenomenon, millions of people – even in geographically remote villages – are contacting one another on the Internet. Dating sites, where men and women specify their wishes and present what they have to offer in a favourable light, abound, but these are by no means the only way contacts are established using the Internet. Friends and potential marriage partners, however remote, are just a mouse click away, and their number seems almost unlimited. In the past, another important factor in bringing together young adults from different regions was the army. Conscript broadened the marriage horizon of the young men of a region by bringing them into contact with young women from elsewhere, and from other classes, notably when farmers’ sons were barracked near the city. This geographical expansion of the marriage market could well have increased contacts between social classes, and so led to more exogamy.

While this might well have been the general rule, the broadening of the marriage horizon could also have had the opposite effect. Members of small social groups – or groups fair in size but dispersed over the country – could have been able to travel far enough to meet potential marriage partners from their own class, whereas previously they would have been prepared to settle for someone from another class. This scenario implies a strong desire to marry within one’s own class, a desire frustrated by the lack of suitable candidates. While one can imagine various kinds of groups for which this was perhaps true – notably religious and ethnic minorities²⁵ – it is more difficult to imagine it being the case for social classes, except for the elite, and wealthier farmers, where the desire to preserve the family’s property or social status was an overriding issue.²⁶

Social pressure

Parents, peers and other individuals or community institutions all play a part in the marriage process. In every country, past and present, the permission of parents has been required if children wanted to marry before

²⁵. This can be seen as evidence of the fact that social-class relations were complicated and sometimes overridden by other allegiances. See Lex Heerma van Voss and Marcel van der Linden (eds), *Class and Other Identities: Gender, Religion and Ethnicity in the Writing of European Labour History* (New York [etc.], 2002).
²⁶. One wonders to what extent it was also true for social groups with a modest amount of property, such as shopkeepers.