Gender revolution, family reversals and fertility

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SHORT ABSTRACT

During the last decade persistence of pronounced gender inequality in the domestic division of labour and childcare has been repeatedly linked to very low fertility rates. The debate on the links between gender equality and family change has become more elaborated in the three contributions published in 2015 in *Population and Development Review* (Anderson and Kohler 2015, Esping-Andersen and Billari 2015, Goldscheider et al. 2015)). These contributions share a broad view of an increase in gender equality over time from low to high levels being tightly linked with fertility change, first contributing to its decline, and then fostering its recovery at higher gender equality levels. Moreover, Esping-Andersen and Billari (2015) as well as Goldscheider et al. (2015) predict a strengthening of the family in gender equal societies, especially among the highly educated women.

We outline and discuss weaknesses in the arguments and ideas on gender equality and family change, and propose a more thorough investigation of the links between domestic gender equality and family in different contexts. We argue that gender equality cannot be seen as the single dominant factor that can explain the changes in family and fertility, but it should rather be seen as a part of the "institutional package" that can either support higher fertility and stronger family or depress fertility to low levels. Specifically, we aim to

- Provide a systematic analysis of trends, reversals and education gradients in family behaviours, especially in marriage, fertility, and divorce in the selected group of countries
- Study the links between changes in family behaviours and changes in gender equality and investigate whether the observed patterns are in line with the hypotheses discussed in different contributions on the subject

EXTENDED ABSTRACT

Introduction: current views on the aggregate links between gender equality, fertility, and family change

The family change in the last decades has progressed alongside an unprecedented change in women's roles and the erosion of patriarchy and the male breadwinner model of the family (Ruggles 2015). Women now outperform men in completing university education in almost all developed countries (Vincent-Lancrin 2008), they expect to spend most of their adult lives in employment (Goldin 2006), and, indeed, in most countries their labour force participation have been converging to that of men (Charles 2011). Inevitably, this massive transformation in women's lives has far-reaching consequences for family relations. During the last decade societal-level gender equality has been identified as one of the main drivers of changes and cross-country differences in fertility and family behaviour. In particular, a persistence of pronounced domestic gender inequality in the division of household labour and in childcare has been repeatedly linked to very low fertility rates prevailing in many developed countries of Europe and East Asia.

In one of the pioneering contributions on the topic, McDonald (2000) proposed that there is an incoherence between high levels of gender equity reached in institutions that deal with women as

individuals, such as education and market employment, and continuing gender inequalities typical of institutions which deal with women as mothers or members of families, such as family itself, childcare provision, parental leave regulation, and often also the tax system. A stronger inequality in these institutions "leaves women with stark choices between children and employment, which, in turn, leads to some women having fewer children than they would like to have, and very low fertility." McDonald has restated his arguments in 2013, emphasising the concept of gender equity which "allows for couples to determine the relative caring roles of the father and the mother, so long as both perceive the outcomes to be fair." (McDonald 2013). He sees women's choices being strongly determined by country's institutional settings, especially by family policies: in societies where women's position in the labour market substantially worsens when they become mothers, gender inequity is manifested through very low fertility, especially among the highly educated women. Esping-Andersen (2009) proposes a view of a long-term transformation in gender norms and behaviours. Only societies that successfully adapt themselves to a "gender revolution" in women's roles, achievements and ambitions, can eventually experience recovery in fertility rates. Gender equality also appeared important in explaining the reversal in the relationship between economic and social development and fertility. Studies suggesting that at advanced levels of development (as measured by the GDP level or by the Human Development Index (HDI)) fertility stops declining or starts rising (Myrskyla et al. 2009, Luci-Greulich and Thévenon 2014) have turned upside down the widely accepted notion that more development equals lower fertility. However, a more thorough investigation suggested that the observed reversals are conditioned by the level of gender equality in the society (Myrskylä et al. 2013).

Recently, the debate on the links between gender equality and family change has become more elaborated, especially in the three contributions published in 2015 in *Population and Development Review* (Esping-Andersen and Billari (2015), Goldscheider et al. (2015), Anderson and Kohler (2015)). These contributions differ in many aspects, including the hypothesized period of key changes in gender relations. However, they share a broad view of an increase in gender equality over time from low to high levels being tightly linked with fertility change, first contributing to its decline (except in Anderson and Kohler (2015), who only discuss the role of economic development), and then fostering its recovery at higher gender equality levels. Hence, fertility is expected to follow a U-shaped trajectory, with distinct stages of its decline to low levels and a subsequent recovery. Moreover, Esping-Andersen and Billari (2015) as well as Goldscheider et al. (2015) predict a strengthening of the family in gender equal societies, especially among the highly educated women. This expectation is at odds with the concept of the "second demographic transition" (SDT, e.g., Lesthaeghe 1995, 2010), which sees the decline of marriage, family instability and the diversity of family forms as the inevitable long-term consequence of the far-reaching transformation in family-related values, attitudes and preferences. Likewise, it is at odds with the perspectives predicting fertility oscillations in the future, such as Easterlin (1978) hypothesis and with the arguments centred on the potential impact of economic and labour market instability on fluctuations in fertility (Mills and Blossfeld 2013). Esping-Andersen and Billari (p. 25, proposition 5), predict that the spread of gender egalitarianism will imply that the actual behaviour in all social groups will closely match their preferences which in turn suggests a convergence in family behaviours across social groups if their preferences remain similar.

We agree on the fundamental importance of changes in women's roles for developments in family behaviour. We argue, however, that gender equality is not a single dominant factor explaining the changes in family and fertility and it should rather be considered as a part of the "institutional package" that can either support higher fertility and stronger family or depress fertility to low levels. Before we outline our arguments and criticisms in more details, we first provide a stylized overview

of the main ideas suggested in the three most recent contributions on the links between gender equality and family.

Overview of the most recent theoretical arguments on the links between gender equality and family change

Anderson and Kohler (2015) build on the earlier research on human development and fertility (Myrskylä et al. 2009 and 2013). Taking a long-term perspective, they propose a six-phase model of demographic transition, where the spread of greater gender equity lags behind socio-economic development by several decades. During the transition, marriage squeeze facilitates the transformation towards gender equality. Specifically, early socio-economic development leads to lower fertility, which in turn creates an imbalance in the marriage market facilitated by the prevailing pattern of older men marrying younger women: following rapid declines in fertility, the stronger cohorts of older single men face a shrinking pool of younger single women. This low availability of marriageable women increases their bargaining power, creating a "gender equality dividend", paving the way for a rise in gender equity, which in turn contributes to higher fertility. Eventually, "family equity "catches up" to institutional gender equity as a consequence of institutional, societal, cultural, economic and demographic changes, effectively reducing the work-family conflict" (Anderson and Kohler 2015: 393). They suggest that both gender equity and fertility have reached high levels in the "first wave developers" – countries of Northern and Western Europe and the overseas English-speaking countries that experienced early industrialization and economic development. These countries also experienced low fertility already in the first decades of the 20th century, subsequently leading to marriage market imbalances in the 1950s. In contrast, countries with later fertility declines, including East Asian societies, saw rapid socioeconomic development and fertility declines in the last decades of the 20th century , but have not yet experienced sufficient change in gender equity. These countries are temporarily "locked in" the very low fertility pattern characterized by high levels of economic development combined with persistent gender inequalities, especially in the domestic sphere.

The study by Goldscheider, Bernhardt and Lappegård (2015) builds on the past trajectories of changes in family, fertility and gender relations in the most gender-equal societies, especially Sweden. The authors outline "gender revolution" as a two-stage process. In its first stage (also called *first half* in their study), smaller families, longer life course and increasing demand for female paid labour allow women to "emerge out of the home" and massively increase their labour market participation. However, their family roles change much more slowly, essentially adding an unpaid second "family shift" to their paid job. An inevitable consequence is the "decline of the family", marked by the postponement of marriage and family formation and the rise of cohabitation and family instability, as embodied in the "second demographic transition" arguments. Subsequently, the *second half* of the gender revolution is characterized by the increased involvement of men in the private sphere of home and the family. This change in outlook in turn allows for a slow trend towards "more family," "reversing trends associated with the SDT by increasing union formation and fertility and reducing union instability" (Goldscheider, et al 2015: 217). This second half of the gender revolution has often occurred gradually, but in the end it strengthens both economic systems as women join the labour market and the families as men become active fathers (ibid, p. 231).

The view that the gender revolution will eventually "conquer" all countries and populations and that its progression heralds reversals in fertility, marriage and partnership instability that bring back "more family" crystallises most clearly in the study by Esping-Andersen and Billari (2015). Their framework of a shift towards gender egalitarianism is based on multiple equilibria models,

elaborated earlier in Esping-Andersen et al. (2013), where only two stable equilibria exist. First, the "traditional equilibrium" where higher level of fertility and marital stability goes hand in hand with the traditional gender role attitudes, male breadwinner model, and the traditional division of the household roles. This equilibrium is then disturbed by an "exogenous shock" that triggers the shift towards gender egalitarian values. The authors list different shocks that can be considered, including birth control, new household technologies, or increased education attainment (p. 11). As new norms of women's economic independence and gender egalitarian ideology gain ground, unstable equilibria emerge, characterized by a coexistence of alternative normative regimes. This state of "normative confusion" is also characterized by a unfair or inefficient outcomes (e.g., a coexistence of traditional household division of gender roles with widespread female employment), which produce low fertility and marital instability. But once the process of diffusion of gender egalitarianism got under way, it becomes "irreversible and continues independently of the actual factors influencing the exogenous shock until the entire "susceptible" population becomes egalitarian (Esping-Andersen and Billari 2015, p. 12, proposition 2). In this stylized model of diffusion, the entire society eventually reaches a new "gender egalitarian equilibrium". In the process, a typical woman experiences "masculinization" in her life course in terms of employment and a typical man experiences a "feminization" of his domestic role. This change also brings about a turnaround in family behaviour characterized by higher fertility (see also Arpino et al. 2015) and marriage rates and more marital stability. Thus, the trend towards "less family" is perceived as a transitory stage rather than a new era of the second demographic transition: "…we posit a return to "more family" as gender egalitarianism gains increasingly dominant normative status" (Esping-Andersen and Billari 2015, p. 3).

Missing elements in the new conceptualisations on gender equality and family change and the objectives of this study

There is no doubt about the extent of changes in women's roles, including their massive participation in tertiary education and in the labour market during the last four decades. Similarly, there is a clear evidence on the shifting attitudes to gender roles, gender division of domestic work, and the actual rising involvement of men in the family across most of the developed countries (Lück and Hofäcker 2003, Gauthier et al. 2004, Cotter et al. 2011, Kan et al. 2011). Also the aggregate-level associations between higher levels of gender equality and higher period and cohort fertility in contemporary low-fertility countries appear solid. Likewise, the theoretical arguments linking gender equality with higher fertility appear plausible. Arguably, domestic gender (in)equality is one of the key factors shaping contemporary fertility. However, we also perceive many of the arguments on the direction of family changes and on temporal associations between these changes and the trends in gender equality as being thin on the ground. Specifically, some of these trends and associations are either relatively poorly documented or based on a few examples pertaining to selected countries and studies, often ignoring the alternative evidence.

In the proposed paper we outline and discuss some of the weaknesses in the arguments and ideas on gender equality and family change claimed by the recent contributions, and propose a more thorough investigation of the links between domestic gender equality and fertility in different contexts. We suggest that the ongoing gender revolution does not necessarily have to result in all societies achieving very high levels of gender equality and that even societies with a mixed record on gender equality or "stalled" gender revolution may, under some conditions, retain relatively higher levels of fertility.

In addition, we argue that gender equality cannot be seen as the single dominant factor that can explain the changes in family and fertility, but it should rather be seen as a part of the "institutional

package" that can either be conducive to higher fertility and stronger family or can depress fertility to low levels. We highlight four other interrelated factors that we see as important as gender equality in shaping fertility and family change and their variation in low-fertility countries. These are 1) economic and labour market conditions, which structure the way how women and men can realise their career ambitions and earning potential (Adserà 2004, 2005, 2011), 2) family policies (Thevenon and Gauthier 2011), 3) the existence of prominent religious, ethnic and migrant subpopulations with specific values, norms and family behaviours that differ strongly from the majority population, and 4) the degree to which a society has accepted new values and family behaviours associated with the second demographic transition. These factors can either affect fertility ideals and intentions (e.g., specific minorities) or influence the likelihood that individuals and couples will achieve their intended family size (e.g., labour market conditions and family policies).

We structure our analysis and discussion alongside the following set of arguments, reflections and hypotheses, some of which will be empirically analysed, while other will only be discussed referring to the available studies and analyses:

Reversals in family behaviour over time and across social groups

1. *The U-shaped trend in fertility and family behaviour is not well substantiated.* The recent contributions by Andersen and Kohler (2015), Arpino et al. (2015), Anderson and Kohler (2015), Esping-Andersen and Billari (2015), and by Goldscheider et al. (2015) imply that fertility first declines and then rises in the course of the "gender revolution". The latter two contributions also predict a similar U-shaped trend in other family behaviours, especially marriage (U-shaped) and divorce (assuming an inverted U-shaped trend). We argue that the empirical record is mixed, with considerable cross-country variation. The reversals have mostly been manifested in period data, and often only in some countries and in some periods of time. In our view the observed reversals in fertility and nuptiality are likely driven by tempo effects. When tempo effects are controlled for, and, especially, when the analysis adopts a cohort perspective, a trend that initially looked like a U-shaped pattern of change often turns into a decline followed by a broad stabilization (see Figure 1 for Sweden as an example). Analysing fertility change from a cohort perspective reveals that the dominant pattern that differentiates between countries is not a fertility reversal or its lack, but a broad bifurcation between countries with broadly stabilizing fertility at relatively higher levels and those where fertility continued declining to low or very low levels (e.g, Rindfuss and Kim Choe 2015). Hence, the claimed reversals in family behaviours are frequently an outcome of the "tempo effect", i.e., the postponement transition (Kohler et al. 2002), which in our view is linked to the shift towards gender equality partly because of the increased education and labour market orientation of women, and partly because new gender and family values are conducive to the expansion of the "exploratory" non-family stage in life before family formation. We posit that the shift to late family formation is a permanent feature of post-transitional societies, which will not reverse even when societies reach very high levels of gender equality.

2. *A mixed picture of the changing education gradients.* Esping-Andersen and Billari (2015: 2) argue that besides macro-level turnarounds in family behaviour a "micro level" reversal in the education gradient in fertility has taken place. Based on the existing literature, we expect a mixed evidence of the changing education gradients in fertility, marriage and divorce. We aim to analyse trends in these gradients for selected countries to find out whether there is a systematic direction of change among younger cohorts living in more gender egalitarian countries.

Exploring the links between changes in gender equality and family behaviours

3. *Were family changes linked to changes in gender equality in the predicted way?* Because fertility and family trajectories often did not follow the predicted U-shaped trend, it is difficult to identify a two-stage process of the retreat from family and the subsequent family resurgence in the progression of gender revolution, outlined by Goldscheider et al. (2015). We aim to take a closer look at the suggested temporal pattern of fertility and family changes in the key studies outlined above and discuss whether the empirical record is consistent with the main arguments presented. To this end, we will link demographic indicators of family change with some indicators of gender equality built with the use of attitudinal data on gender norms from European Values Study and data on gender division of unpaid labour from the Multinational Time Use Survey in different societal contexts (including Central and Eastern Europe).

4. *Stalled gender revolution, fertility and family trends.* We will also discuss the possibility that in some societies the gender revolution has "stalled" (England 2010) and explore possible links between the stalled gender revolution and family changes. This exercise is not entirely hypothetical: for instance, van Egmond et al. (2010) document that a trend towards more egalitarian gender attitudes in Australia stalled and in some cases reversed after the mid-1990s. We also argue that in contrast with Esping-Andersen and Billari's (2015) perspective, some societies with stalled or incomplete gender revolution may actually experience relatively high fertility levels, especially if they show strong inequalities, social status polarization in family behaviour and/or have significant minorities that adhere to the more traditional gender views. Examples of such settings include Israel and Utah in the United States.

5. Finally, we will investigate the argument on *gender equality dividend* proposed by Andersen and Kohler (2015). Specifically, we will look at which societies and in which periods the hypothesized marriage squeeze became strongest and whether the size of this marriage squeeze was linked to the later shift towards gender egalitarianism. Among the broad sets of arguments on the links between gender equality and family behaviours discussed above we find this argument to be the weakest and expect it will not stand a more careful scrutiny.

Summary of main aims and planned contribution of the paper

In order to address the hypotheses and arguments outlined above, we aim to collect, compute and analyse data on period and cohort trends in fertility, marriage, and divorce and their educational gradients in selected countries representing different welfare regimes and institutional settings. Our preliminary list of countries include Sweden, Belgium, United Kingdom, France, and Austria for Western and Northern Europe, Spain for Southern Europe, Czech Republic, Poland and Russia for Central and Eastern Europe, Japan and the Republic of Korea for East Asia, and Australia and the United States for English speaking countries overseas. This list will be modified depending on data availability. We will also try to collect comparable indicators of attitudes towards gender equality and on the actual levels of domestic gender equality and their changes over time, especially in this group of countries.

Our research will go beyond the existing analyses especially in the effort to provide a comprehensive empirical evidence related to various arguments and hypotheses proposed in the recent literature. Our contribution is particularly valuable in the following aspects:

- We will provide a systematic analysis of trends and reversals in family behaviours, especially in marriage, fertility, and divorce in the selected group of countries (see Figures 1 and 2 as examples for Sweden)

- We will study the links between changes in family behaviours and the trends in gender equality and investigate whether the observed patterns are in line with the hypotheses discussed in different contributions on the subject.
- We will incorporate evidence for selected countries of Central and Eastern Europe, which are often neglected in empirical research. These countries are also relevant from the theoretical point of view as they had experienced an early shift towards high levels of labour force participation among women in the 1950s and 1960s, and yet the attitudes towards gender roles and the actual domestic division of labour have often remained traditional (Sobotka 2016).
- We propose that the "gender revolution" and its impact on family should not be studied in isolation as it is one of the key interrelated factors that affect contemporary family behaviour in post-transitional countries.

Figure 1: Period total fertility rate (TFR, 1925-2014), tempo- and parity-adjusted total fertility (TFRp*, 1971-2010) and completed cohort fertility (shifted by 30 years, women born 1895-1974) in Sweden

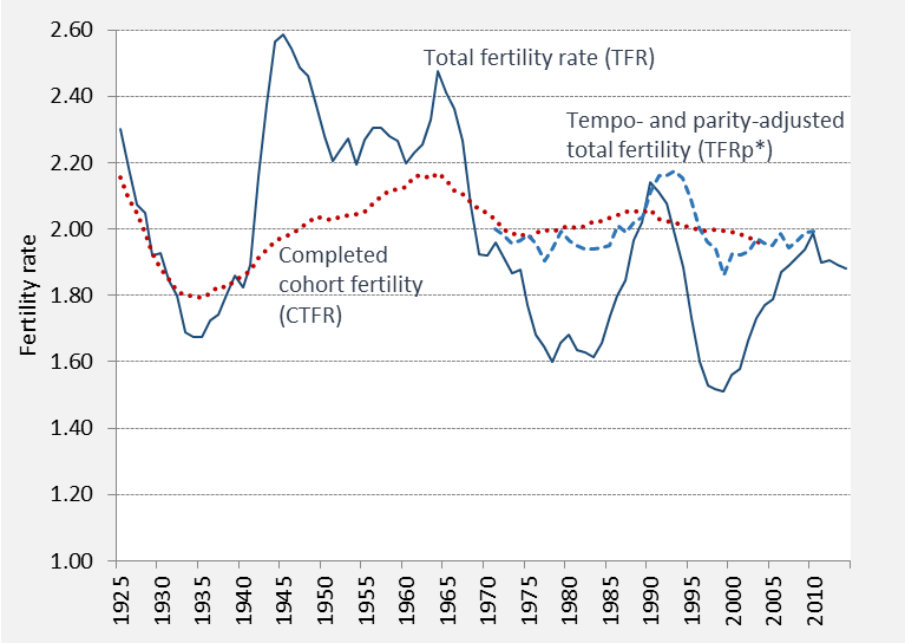
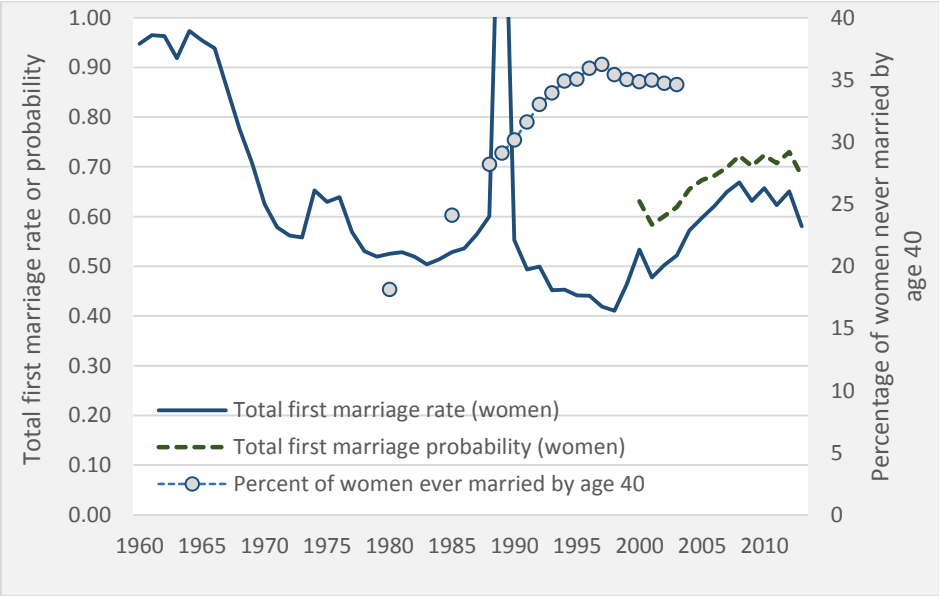


Figure 2: Period total first marriage rate among women (1960-2013), period total first marriage probability among women (2000-2013) and the share of women born in 1950-73 who never married by age 40 (data shifted by 30 years), Sweden



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