

ANALYSING LINKAGES BETWEEN GENDER AND POVERTY: A METHODOLOGICAL NOTE

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with

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I. Introduction

This methodological note on linkages between ‘gender’ and ‘poverty’ looks into the complexities involved in establishing the nature and extent of relative poverty of men and women. The literature in this area is large and growing. Much of this literature cites evidence on differences in incomes of men and women, imputed or otherwise, as well as gender differences in other ‘indicators’ of poverty. For most indicators, such data are compiled mostly from secondary data sources. However the evidence cited on gender differences in incomes, or consumption, is generally garnered from household level surveys. Samples for micro-studies are drawn from diverse populations using varied sampling frameworks. A number of these studies have depended on imputing values to women’s non-market work, or have used various different techniques to allocate total household incomes between men and women to arrive at relative incomes¹.

¹ The literature on the topic is indeed vast. For a recent summary of evidence, see ‘*Consumption Expenditure and Female Poverty : A Review of the Evidence*’, by Julian A. Lampietti and Linda Stalker. Policy Research Report on Gender and Development, Working paper Series No. 11. World Bank, 2000. The paper summarizes the findings from over sixty poverty assessment exercises carried out by the World Bank since 1994 in different parts of the developing world. For a critical analysis of the evidence on gender dimension of poverty in the recent PRSPs around the globe, see ‘*Failing women, sustaining poverty: Gender in Poverty Reduction Strategy Papers*’. Report for the UK Gender and Development Network, by Ann Whitehead. May 2003. Also see ‘*Women in Extreme Poverty*’. Report of a multi-country study in Asia carried out by the Institute of Social Studies Trust., 1998.

The commonest question that underlies these investigations, although often not explicitly stated, is: 'Are women poorer than men'? Most of the studies, though not all, have interpreted the available distributional evidence to arrive at answers that are in the affirmative.

This overview looks into the inherent complexities that are involved in exploring the links between gender and poverty. While the general ramifications of the issue are discussed in the paper, the thrust of the solution suggested is couched within the context of the MIMAP Program Initiative of IDRC. It lies within the interface of the agenda of the MIMAP-Poverty Monitoring Surveys that have been carried out within MIMAP for a number of years now, and that of the Gender Network, which is a thematic area within MIMAP. The paper provides the methodological framework within which five country studies were carried out under the module on Gender and Poverty within the second phase of the MIMAP-Gender Network (II) research agenda and explicates how these studies have sought to address the issue.²

The following sections of the overview look into the issues dealing with poverty, gender bias and the standard indicators that have been used to identify and measure these two concepts. It then goes on to suggest ways of identifying the intersection of the two within the context of the MIMAP structure.

² The Gender and Poverty module of the MIMAP-Gender Network (Phase II) was carried out in five countries of Asia. These are Bangladesh, Nepal, Pakistan, the Philippines, and Sri Lanka. These are: Mujeri, Mustafa (2003): *Gender Issues at the Local Level: Summary Results of a Pilot Survey in Bangladesh*, Bangladesh Institute of Development Studies; Sharma, Ram K, and Manasa Thakurtha (2003): *Including Non-Conventional Gender Indicators in Local Planning in Nepal*, National Labour Academy, Nepal; Siddiqui, Rehana and Shahnaz Hamid (2003): *Correlates of Poverty: Gender Dimensions*, Pakistan Institute of Development Economics; Reyesm Celia, Jasminda P Asiro, Kenneth C Ilarde, Anne Bernadette, E Mandap, Lani E Valencia and Rex Aurelius C Robielios (2003): *Gender and Poverty: The Case of Philippines, Vol. I and II*, DLSU Angelo King Institute of Economic and Business Studies; Jayweera, Swarna, Thana Sanmugam and Harini Amarasuriya (2003): *Gender and Poverty in Selected Locations in Sri Lanka*, Center for Women's Research, Sri Lanka.

II. Poverty, gender and their 'indicators'

II(a). Poverty : Definitional and measurement issues

Although poverty may be easier of the two concepts to handle, adequate ways to measure and monitor poverty levels have been problematic. The issues relate to the choice of one or more indicators of poverty, that of indexation in case of multiple indicators, that of choice of the cut off points for arriving at head count ratios and the problems dealing with distribution below, and above the poverty line. Each of these pose significant analytical and measurement problems³.

Household incomes continue to be a natural forerunner among poverty indicators. Although there are issues of whether or not it should be total or per capita household incomes, or whether one should further refine the measure by correcting for demographic variations within households by invoking equivalence scales. Some variant of household incomes continues to dominate single-indicator measures of poverty.

It is, however, universally recognised now that household incomes can capture only one facet of poverty. The understanding of poverty as a multi-dimensional phenomenon, implying that there is less than absolute degree of substitutability between different measures of poverty, is universally accepted now. Thus the issue of poverty measurement, and the subsequent policy and program implications, will to a large extent depend upon which particular *dimensions*, or *facets* of poverty are being addressed. The generally used components of poverty are:

³ Unlike the income-based measures of poverty, the 'human-development linked' measures of poverty are multidimensional since they are not necessarily expressed in money-metric terms. Thus, such measures of poverty can be better when we are dealing with gender. This is because women are mostly engaged in non-market activities such as reproductive activities, household activities etc. For a brief summary on uni-dimensional and multidimensional methods on the measurement of poverty, see Annex-I by Shambhu Ghatak

(a) Income and consumption-based measures

These could be any one or all of the following variables : Household or individual incomes and / or consumption ; in total and / or per capita terms ; unweighted and / or normalized for household demographics (equivalence scale adjusted)

(b) 'Human development' linked measures:

The more commonly used indicators in this class relate to:

(i) Health: Life Expectancy; other mortality based indicators (age-specific mortality such as infant and child mortality, maternal mortality etc.); morbidity based indicators (such as Disability Adjusted Life Expectancy or DALE, incidence of chronic ailments etc.); health infrastructure based indicators (doctors/hospitals per 100,000 population by location etc.).

(ii) Education: Literacy rates, school enrolment ratio, and related indicators

(iii) Wages and Income-earning opportunities: Household and individual incomes, nature and extent of labour market participation etc.

(iv) Infrastructure: Community and household based; Physical (road, waterways, telecommunication networks per capita or per unit of land area); environmental (air and water pollution levels, availability of safe drinking water and sanitation, forest cover etc.); social (social capital, kinship network etc.), institutional (legal system, governance structures etc.).

Apart from these quantitatively oriented measures of poverty, it is important to keep in mind a few related concepts that occur in poverty literature. In the present context, the most important of these differences are between absolute and relative poverty.

Absolute poverty is defined in terms of the population below a certain minimum, socially acceptable standard of living, usually defined in terms of nutritional intakes. There could be hierarchies within that group, depending on the 'depth' of poverty below a specified 'poverty line'.

'Poverty' can be absolute in the space of capabilities but relative in the space of commodities and/or characteristics.⁴ It should be kept in mind that relative poverty may go down while absolute poverty may increase, and vice versa.

Apart from this there are differences that are drawn between the objective and subjective perspectives of poverty and physiological and sociological deprivations.

Some other related concepts would be the links between poverty and inequality, between poverty and vulnerability, and between measured poverty and exclusion.

Clearly there are a number of issues here, including but not exclusively related to measurement. There is also another set of issues which we have not dealt with here that relate to the question of mobility, economic as well as social, and the related question of chronic and transient poverty.

II(b). Gender: Definitional and measurement issues

If deciding on how to arrive at a perfect indicator for poverty is difficult, then it is doubly difficult get one for gender. Phase I of the Gender Network was involved,

⁴ Sen, Amartya K (1983): 'Poor, Relatively Speaking', Oxford Economic Papers No. 37, pp 669-676. To cite an example, a household which is incapable of supplying adequate food to its members is considered poor in absolute terms. However the cost and composition of such food would vary between contexts. Similarly, a household which is incapable of educating its children because there are no schools in the neighborhood, let us suppose in a remote rural area, is considered absolutely poor in terms of such capability. Such a household may or may not have the money to provide such education if it were located in an urban metropolis. Another household with the same amount of income but located elsewhere would have that capability. So the second household will not be absolutely poor in terms of such capability.

among other things, in trying to find an answer to the question of what constitutes a good measure of gender bias.

The first thing to understand about gender is that it is a social construct, although biology is an important factor in its construction. As a social construct, gender is a relation, and like all relations, is unobserved and unobservable. All that one observes are its manifestations, which could vary from one context to the next. In the language of econometrics, it is a 'latent variable',

Some manifestations of gender discrimination are very overt and easy to recognize. When a young girl in a household is being denied education, nutritious food or adequate health care where in the same household, a young boy gets all of this, it is a case of clear and overt gender discrimination. However when a young woman is not allowed to go out and earn a living because it is felt that she needs to be 'protected' or that she does not 'need' the money, independent of whether or not she may need the social interaction and the sense of self esteem that goes with having control over her own life, then one has to delve deeper to figure out if such pronouncements are not cover-ups for the continued subordination of the woman.

The other crucial thing to remember about gender indicators is that like indicators of poverty, manifestation of gender bias is multi-dimensional, with social, economic, political and demographic ramifications. However, the similarity between the two ends there. Most indicators of poverty generally move together. If they are not collinear, they are at least more or less monotonically linked. In contrast to this scenario, gender indicators are not merely non-collinear, some of the more commonly used gender indicators are often not even monotonically linked. This creates enormous problems of indexation in certain situations. The only set of gender indicators that seem to cut across barriers of class and caste are the 'non-

conventional' indicators of gender bias: gender-based stress, anxiety and actual or credible threat of violence.⁵

III. Linking 'poverty' and 'gender'

III.1. The Problematique

Despite all the well-known problems of indicators of attributes, processes or capabilities, it is in some sense far easier to deal with them than with the concepts they seek to measure. It is especially so if one is to use empirical data for answering questions. Thus although both poverty and gender are concepts that have economic and social dimensions that go beyond any of their many and varied 'indicators, given the nature of problem at hand, we will restrict this to an indicator-based analysis.

Given a data set containing information on both sets of indicators, linkages between poverty and gender can then be studied in different ways. It can be done by selecting one indicator for each variable and then mapping it onto to a selected indicator for the other. Alternately one can map all indicators for one variable and map them against each one for the other. While in principle this is a feasible option, if there are many indicators for each of the two variables, one would end up with a lot of maps. Or one can pitch in the middle and choose one important indicator for one of the two variables and see how all the indicators for the other map against it.

If one decides to settle for this option, then the next question will be to decide which of the two variables should be chosen as a single-indicator one for the mapping exercise. The problem gets sorted out by itself since poverty has an indicator that is a natural frontrunner among all others. This is none other than income. With all the

⁵ For an elaboration of these arguments, see the introductory chapter 'What is new about gender bias?' by Swapna Mukhopadhyay in 'Tracking Gender Equity Under Structural Reforms: Continuity and Change in South Asia', edited by Swapna Mukhoapdhyay and Ratna Sudarshan, Kali for Women and IDRC, August 2003. It is important to point out that there can be problems in assessing the degree of violence and stress, which a woman undergoes, due to under reporting on her part. This can happen when the interview of the woman is taken in front of her husband or in-laws.

well-known limitations of income as a measure of well being, it is still the most commonly chosen measure for poverty.

Differences between men's and women's incomes, however, is not a good indicator for measuring gender bias. This is not because in principle it is faulty, but because in practice it is difficult to measure women's income.

III.2. Problems with measuring women's incomes

The most direct way of approaching the issue of gender-poverty linkages would be to ask questions like whether or not women are 'poorer' than men on an average; if so, what is the nature of the distribution of the differential in incomes of men and women, whether in the aggregate, or within different sub-groups, etc.

However, as countless number of studies have established, it is not easy to arrive at sensible estimates of women's income.⁶ It is especially difficult to get gender-based income differentiation in situations where large numbers of women are involved in non-market or reproductive activities. People have reverted to different methods of estimating women's income in these situations, but each one is fraught with problems. While it is not the purpose of this short review to provide a summary of the evidence, the following paragraphs seek to indicate the types of problems one comes up with in measuring women's incomes.

⁶ Ferran, Lourdes (1998): *Note on Concepts and Techniques for Estimating the Contribution of Women Working in the Informal Sector*, Paper presented for the United Nations Statistics Division, the Gender and Development Programme of the United Nations Development Programme (UNDP) and the project "Women in Informal Employment: Globalizing and Organizing", (WIEGO). An earlier version was presented at the Delhi Group Meeting on Informal Sector Statistics, Ankara, 28-30 April, 1998. See www.wiego.org/papers/lourdes.pdf; Sethuraman, S.V. (1998): *Gender, Informality and Poverty: A Global Review--Gender Bias in Female Informal Employment and Incomes in Developing Countries*, World Bank, Poverty Reduction and Economic Management, Washington D.C. and WIEGO, Geneva.

Valuing women's work

There have been many attempts to impute the value of women's work within the home, both in purely reproductive labour and in 'economically productive' activities that are not valued for a variety of reasons. These activities include childcare, collecting fuel wood from forest, water from distant water sources etc. Generally these are fraught with problems of imputation of values in the absence of markets.⁷

Methods based on models of intra-household decision making

Yet others have attempted to estimate relative well being of men and women within households by taking recourse to different kinds of models of intra household decision making. Especially interesting in this genre are the various models of bargaining, including those of cooperative conflict. The Chiappori-type models estimate gender division of household income by taking recourse to divisions in terms of observed measures of consumption within the household. But again these derivations require assumptions about functional forms that may be unrealistic.⁸

Female headed households

One other option which was popular at one time but has been virtually abandoned for the many problems it had, is to get through to poverty-gender linkages through female headed households.⁹

⁷ Luxton, Meg (1997): *The UN, Women and Household Labour: Measuring and Valuing Unpaid Work*, Women's International Studies Forum, Vol. 20, No. 3.

⁸ Dauphin, Anyck (2000): *'Gender and Intra-household Decision-making: A Review of Theories and their Relevance for Macro-modeling'*, Gender Planning Network-I Working Papers, accesses from <http://www.isst-india.org/GPNIWP3.pdf>; Bourguignon, F, M. Browning, A Chiappori and V Lechene (1993): *'Intra-household Allocation of Consumption: A Model and Some Evidence from French Data'*, *Annales d'economie et de statistique*, No. 29, pp 137-156.

⁹ For a brief summary on the literature on female-headed households, see Annex-II by Shambhu Ghatak.

One of the major problems of separating out women's work or income from men's income within the households is that much of the production and even consumption within households is carried out together. The same argument has been used to support why it may be better to use household level income rather than individual income to decide on poverty cut off point.

Thus by and large, because of the difficulties of measuring the value of women's work, especially in poor households, it is advisable not to use income differentials as a measure of poverty differential between men and women.

IV. Suggested solution within the context of MIMAP

Let us assume that *poverty* (P) has three observable dimensions. Let these be *income, health status, and education*¹⁰.

Suppose, likewise, that *gender* (G) has three observable dimensions measured by *Indicators of gender-based stress, anxiety and violence, Indicators of differential power/control, and Indicators of differential levels of conventional measures of well-being* (education, health, etc.). For obvious reasons, all these gender indicators will have to be at the individual level.¹¹ If one has information on all these indicators on *gender* and also on the *poverty* level of the households, it is possible to map each of these gender indicators against household poverty levels. To a certain extent, the problem of mapping is simplified because there is a large intersection set between non-income poverty indicators and 'conventional' indicators of gender.

Since in the Second Phase of the Gender Network, household surveys were conducted to collect information on all these indicators, it is possible to do the analysis that is being suggested above.

¹⁰ Cf. Section II (a) above.

¹¹ This does not preclude the possibility that a community or a household may be more or less gender biased as compared to another community or household if all persons in the first set share more or less gender discriminatory values as compared to those in the second.

Research done in the First Phase of the Gender Network suggests that while it is possible to measure stress and mental ill-being at the individual level, it is not possible to measure what fraction of it is caused by gender related factors. The method adopted to counter this problem in the earlier set of research studies was to control for external factors by analysing gender differences in stress levels within the family and then carry out multivariate analysis to extract the influence of gender. Two indicators were developed to measure stress levels in the first phase of the research. These are the *Subjective Well Being Indicator* (SUBI) and the *General Health Questionnaire* (GHQ).¹² Data for calculating a number of indicators on decision making and control have also been collected in these household surveys, over and above indicators of 'conventional' measures of gender bias such as in the area of education or health are also easily available.

The best option in our view for investigating the P-G linkages is to separate out households that are income-poor (Inc-P) from those that are not income –poor or income-non-poor, (Inc-NP), whichever way one defines 'income', and then try to answer two sets of questions. These can be formulated as follows:

Are Women in Inc-P households better or worse off than women in Inc-NP households in terms of the conventional indicators of well being such as education and health? Are they better or worse off in terms of access, control, and power? Are they better or worse off in terms of the mental health indicators like SUBI or GHQ?

To assess whether women are relatively better or worse off than men in poor as compared to non-poor households in terms of the three sets of gender indicators, one could seek answers to the following question:

Do women fare better than men in Inc-NP households as compared to income-poor households in terms of conventional indicators such as education and health? Are women relatively better off than men in income non-poor households as compared

¹² See Mukhopadhyay and Sudarshan, op. cit.

to income poor households in terms of access, power and control? Are women better off than men in income-non-poor households compared to their relative position in income-poor household in terms of indicators of mental health such as SUBI and GHQ?

Given the data on household incomes and individual level data on conventional and non-conventional indicators of gender bias, one can answer all these questions. The advantage of this method over methods that depend on estimating women's share in household income or consumption is that it is decidedly much simpler and also that one can get sensible answers to the relative 'poverty' of men and women without having to go through dubious methods of calculating individual incomes. Analysis of this kind can be supplemented by standard methods such as multivariate regression analysis.

ANNEX-I

A Note on Poverty

Different Approaches to Poverty

1. Poverty Line Approach, Capabilities Approach and Participatory Poverty Assessments

The three main approaches to poverty analysis that have featured in the development literature are: I. The *poverty line approach*, which measures the economic 'means' that households and individuals have to meet their basic needs/ calorie (determined by their money income); II. The *capabilities approach* which explores a broader range of means (endowments and entitlements, which can be arrived through both market and non-market) as well as ends ('functioning achievements'); and III. *Participatory Poverty Assessments* (PPA), which explore the causes and outcomes of poverty in more context-specific ways (Kabeer, 2003)¹³.

The *poverty line approach* suffers from certain loopholes--(a) people meet their survival needs not only through monetary income but through a variety of resources like CPRs (common property resources), social overheads etc.; (b) people can have stocks of assets, stores and claims, which they can exchange; (c) well-being may not only depend on purchasing power but also less tangible aspects like political rights, dignity and self-respect. Poverty line approach does not say much about women's experience of poverty relative to men within the same household since it is based on the assumption that household is organised around the pooling of income and meeting the welfare needs of all members (Kabeer, 2003)¹⁴.

The capabilities approach widened the idea of 'means' to include, other than market generated earnings--essential services that could help people to meet essential needs like safe drinking water, sanitation, health facilities etc. The capabilities approach blurs the distinction between means and ends. Health and education, for example, are both functioning achievements in themselves as well as capabilities that allow people to achieve other valued functions. Because capabilities are defined in relation to the individual--unlike the poverty line, which is defined in relation to the household--they

¹³ Kabeer, Naila (2003): Chapter: 4-"Approaches to Poverty Analysis and its Gender Dimensions", in Gender Mainstreaming in poverty Eradication and the Millennium Development Goals--A Handbook for Policy-Makers and Other Stakeholders, Commonwealth Secretariat, International Development Research Centre (IDRC).

¹⁴ Kabeer, Naila (2003): Ibid.

can also be interpreted and measured in gender-disaggregated ways, for e.g. the use of gender development index (GDI) and gender empowerment measure (GEM) [Kabeer, 2003]¹⁵.

A growing body of works on poverty is now carried out from the perspective of the poor. Such participatory poverty assessments (PPAs) use a variety of largely qualitative methods (including focus groups, in-depth discussions with key informants and various visual techniques such as matrices, mapping, transects and Venn diagrams). The objective behind such attempts is to promote 'bottom-up' appraisal and evaluation of development projects through a range of techniques collectively known as Participatory Rural Appraisal (PRA). But PPAs can be subject to gender biases since they rely on poor people's perceptions, which reflect 'norms' and 'values' that do not attach any weight to gender inequalities or to violation of woman's human rights. It can also happen that the research team fails to interpret and incorporate the information gathered through the PPAs on which policy measures will be based [Kabeer, 2003]¹⁶.

2. Direct and Indirect Approaches to Poverty

The *direct* or *basic needs approach* to poverty measurement is based on the comparison of observed condition, need by need, or satisfier by satisfier, with its normative threshold. This approach is also called *Unsatisfied Basic Needs Approach*. Alternatively, one can measure the resources that a household commands and compare the magnitude and composition of these resources with the resource requirement to meet the set of basic needs. This is the *indirect approach* to the measurement of poverty. When the resources identified are reduced to private current income (or private consumption expenditure) the methodology is referred to as *poverty line*. The poverty line (PL) is the only existing application of the indirect method.

3. Unidimensional and Multi-dimensional Approach to assess Poverty

Poverty line method is *uni-dimensional approach* since it is based on money metric terms (poverty is measured in terms of income--a sum of money). In contrast, non-money-metric indicators are by their nature *multi-dimensional* such as life-expectancy, literacy rates, sex-ratio etc. The variants of *Unsatisfied Basic Needs (UBN) approach* utilize several indicators in order to cover a representative set of basic needs (Boltvinik, 2003)¹⁷.

¹⁵ Kabeer, Naila (2003): Ibid.

¹⁶ Kabeer, Naila (2003): Ibid.

¹⁷ Boltvinik, Julio (2003): Poverty Measurement Methods---An Overview, accessed from www.undp.org/poverty/publications/pov_red/Poverty_Measurement_Methods.pdf

Poverty Threshold Definition

The World Bank (1993)¹⁸ says that any poverty cut-off will reflect some degree of subjectivity of how is poverty defined. But Amartya Sen (1981)¹⁹ arguing against the subjective view of poverty, considers that researchers describe existing social prescriptions (norms or standards), thus implying that these prescriptions or norms have a social objective existence and can be observed and described by the social scientist. Thus, the cut-off or minimum subsistence level is culturally defined, and is a part of the moral economy of the people.

Peter Townsend (1979²⁰, 1993²¹), tries to define poverty line as that income level (or narrow band of income levels) at which the two groups--'multi-deprived group' (poor) and 'less-deprived group' (non-poor), can best be separated 'objectively'. But Townsend thinks that definition by an individual, or by society collectively, of what level represents 'poverty', will always be a value judgement.

Absolute and Relative Conceptions of Poverty

Townsend (1979)²² thinks that any rigorous conceptualization of the social determination of need dissolves the idea of 'absolute' need and incorporates the idea of 'relative' needs. It is because the necessities of life are not fixed and are being continuously adapted and augmented as changes take place in a society and in its products.

But Sen thinks that "...there is an irreducible core of absolute deprivation in our idea of poverty, which translates reports of starvation, malnutrition and visible hardship into a diagnosis of poverty without having to ascertain first the relative picture. Thus, the approach of relative deprivation supplements rather than supplants the analysis of poverty in terms of absolute dispossession" (1981)²³.

¹⁸ World Bank (1993): *Poverty and Income Distribution in Latin America: The Story of the 1980s*, Washington, D.C.

¹⁹ Sen, Amartya K (1981): *Poverty and Famines-An Essay on Entitlement and Deprivation*, Clarendon Press, Oxford, UK.

²⁰ Townsend, Peter (1979): 'The Development of Research on Poverty', in Department of Health and Social Security, *Social Research: The Definition and Measurement of Poverty*, HMSO, London.

²¹ Townsend, Peter (1993): *The International Analysis of Poverty*, Harvester/ Wheatsheaf, Hertfordshire.

²² Townsend, Peter (1979): 'The Development of Research on Poverty', in Department of Health and Social Security, *Social Research: The Definition and Measurement of Poverty*, HMSO, London.

²³ Sen, Amartya K (1981): *Poverty and Famines-An Essay on Entitlement and Deprivation*, Clarendon Press, Oxford, UK.

Available Poverty Methods

The available poverty methods can be classified into: *normative methods* and *non-normative methods*. Amongst the non-normative (or relative) methods one finds the purely relative ones, which define the poverty-line as a fraction of average income (or median or mode) or those which define the poor as the population in certain specified deciles. *Wolf-point* or *equilibrium point* method identifies poverty line as that level of income at which household saving is zero, assuming that consumers make reasonable choices in allocating their budget. One can also identify poverty line as that income level where the *Engel coefficient* (proportion of income or expenditure) allocated to food reaches a maximum, which would indicate that the household has reached a point where most urgent food needs have been met.

Semi-normative and normative methods can be classified into 3 groups i.e. *multidimensional-direct*, *unidimensional-indirect* and *multidimensional-combined methods*.

ANNEX-II

A Note on Female-headed Households

Problem with the terminology

There are problems associated with the definitions and measures of female-headed households, particularly in the developing countries, since the term 'head of the household' has an additional meaning when it is situated in a patriarchal set-up. The term fails to include the wide range of family structures that are economically dependent on women. Some of the additional terms which can be included are women-maintained, woman-led, mother-centered, single-parent or male-absent, rather than woman-headed to ascribe meaning to different family structures. [Buvinic, Youssef, and Von Elm (1978)²⁴; Youssef and Hetler (1983)²⁵; Folbre (1991)²⁶]. There are many social and economic situations that predispose certain family types to poverty, and these may be highly culture-bound.

Feminisation of poverty--A cross-country experience

In agriculture women become heads of farms or households due to male migration. Left-behind female farm managers are becoming increasingly prevalent in many parts of the developing world as labour mobility has increased dramatically, both nationally and internally due to unequal urbanization and industrialization (Youssef and Hetler, 1983)²⁷. Women farmers are poorer because they have similar economic burdens compared to men but less access to the productive resources (land, cattle, and labour). A majority but not all, studies find that woman headed households are over-represented among the poor, by using a variety of indicators like total or per capita household income, mean income per adult equivalence, total or capita consumption expenditures, earnings of the head, access to services and ownership of land and assets, among others. [Geldstein (1992)²⁸; Schkolnik (1991)²⁹; Dasgupta (1993)³⁰]. There is heterogeneity in the situation of female heads who have been left

²⁴ Buvinic, M., N Youssef and B. von Elm (1978): "Women-headed Households: The Ignored Factor in Development Planning." Washington, D.C.: International Centre for Research on Women.

²⁵ Youssef, Nadia H., and Carol Hetler (1983): Rural Households Headed by Women: A Priority Issue for policy Concern. Geneva: ILO.

²⁶ Folbre, Nancy (1991): "Mother on their Own: Policy Issues for Developing Countries". Paper prepared for the joint ICRW/ Population Council series on "The Determinants and Consequences of Female-Headed Households".

²⁷ Youssef, Nadia H., and Carol Hetler (1983): Rural Households Headed by Women: A Priority Issue for policy Concern. Geneva: ILO.

²⁸ Geldstein (1992): "Aumentan los Hogares Sostenidos por Mujeres". Boletín del SIDEMA (Argentina), December 6.

²⁹ Schkolnik, Mariana (1991): Chile: Impacto del Gasto Social en los Hogares con Jefatura Feminina (Draft). Santiago, Chile: PREALC Working Document.

³⁰ Dasgupta, Partha (1993): An Inquiry into Well-Being and Destitution. Oxford, England: Clarendon Press.

behind by the economic migration of their partner, and this heterogeneity depends both on the generosity and regularity of remittances as well as on the socio-economic situation of the left-behind household. Over-dependence on remittances can make woman-headed households, even those that are comparatively well-off, vulnerable to poverty [Kennedy (1989)³¹; Richter and Hevanon (1993)].

Female-headed households have lower incomes not because they have more children or fewer adults but because female head earns less. The lower earning power of women heads can be due to their lower education, and their restricted access to land and credit. This inability to acquire resources also results in women making inappropriate or inefficient choices [Barros et al. (1993)³²; McLeod (1988)³³]. They may face greater time and mobility constraints, which can result in an apparent “preference” for working fewer hours for pay, for “choosing” lower-paying jobs that are nevertheless more compatible with childcare etc. Women also face discrimination in getting access to jobs or resources due to the existing gender norms of the society [Berheide and Segal (1989)³⁴; Kossoudji and Mueller (1983)³⁵].

Methodological considerations

Woman-headed households are over-represented among the poor when studies use total household income or expenditure measures, not adjusted by the numbers of household members. Visaria (1980)³⁶ noted that their representation among the poor decreases when per capita rather than total income or expenditure measures are used because woman-headed households are, on average, smaller than other households. Consumption indicators are likely to be subject to gender biases that result in an underestimation of the poverty of female-headed households [Ravallion (1992)]³⁷. Firstly, because woman-heads of smaller households since they are often the chief earners and housewives,

³¹ Kennedy, Eileen (1989): The Significance of Female headed Households in Kenya. Presentation at joint ICRW/ Population Council Seminar II: “Consequences of Female Headship and Female Maintenance”. Washington, D.C.: February 27-28, 1989.

³² Barros, Ricardo, Louise Fox, and Rosane Mendonca (1993): Female headed Households, Poverty and the Welfare of Children in Urban Brazil. Paper presented for the joint ICRW/ Population Council project on “Family Structure, Female Headship and Maintenance of Families and Poverty”.

³³ McLeod, Ruth (1988): Shelter Experiences of Female Heads of Households in Kingston, Jamaica. United Nations Centre for Human Settlement (HABITAT). Draft presented at joint ICRW/ Population Council Seminar II: “Consequences of Female Headship and Female Maintenance”. Washington, D.C., February, 27-28, 1989.

³⁴ Berheide, Catherine W. and Marcia T. Segal (1989): Locating Women in the Development Process: Female Small-Holders in Malawi. Paper presented at the National Women’s Studies Association Meetings, June 1989.

³⁵ Kossoudji, Sherrie and Eva Mueller (1983): “The Economic and Demographic Status of Female Headed Households in Rural Botswana”. *Economic Development and Cultural Change* 21 (July): 831-859.

³⁶ Visaria, Pravin (1980): “Poverty and Living Standards in Asia”. *Population and Development Review* 6(2): 189-223.

³⁷ Ravallion, Martin (1992): *Poverty Comparisons: A Guide to Concepts and Methods*. Living Standards Measurement Study Working Paper No. 88. Washington, D.C. The World Bank.

are likely to more accurately report household consumption expenditures than wives in larger households who may not know how much the husbands spend [Horton and Miller (1989)]³⁸. Secondly, in terms of capturing the legacy of poverty, consumption measures may be substantially augmented by the time women and children spend in the production of home goods, especially in farm households, at the expense of time devoted to critical activities like child care and income generation for women and schooling for children [Barros et al. (1993)]³⁹.

A problem with the per capita indicators of household economic status is that they fail to capture dependency ratios (--ratio of number of non-earning members to number of earning members) across headship types. Adult equivalence scales, that are often used to adjust household consumption by size and composition of the household, further mask dependency burdens by assigning an adult male equivalence of less than one to females and children, on the assumption that their consumption needs are less than those of men. Using adult equivalence scales can distort assessment if households' risk of poverty rise with higher household dependency burdens. Adult equivalence scales can give artificially low poverty risks for households with high proportions of dependents children relative to adults, such as those headed by women. It is thus essential to take a measure which provides multi-dimensional aspect of poverty [Ravallion (1992)]⁴⁰.

The relationship between female-headed households and poverty is not always consistent. It has a regional dimension too, with female-headed households to be over-represented among the poor in Latin America. This is because female headship can happen through a variety of processes--custom, widowhood, divorce, separation, polygamy, migration by male or female members and so on. For example, female-headed households set up by wives in polygamous marriages in Africa or in matrilineal societies in Africa and Asia tends to be well off. Recent attempts to incorporate size and composition of household membership in calculating income measures have generally strengthened the association between female headship and poverty (Kabeer, 2003)⁴¹.

³⁸ Horton, Susan, and Barbara Diane Miller (1989): The Effect of Gender and Household Head on Food Expenditure: Evidence from Low-Income Households in Jamaica. Paper presented at the Conference on Family, Gender Differences, and the Development, at Economic Growth Centre, Yale University, September 4-6, 1989.

³⁹ Barros, Ricardo, Louise Fox, and Rosane Mendonca (1993): Female headed Households, Poverty and the Welfare of Children in Urban Brazil. Paper presented for the joint ICRW/ Population Council project on "Family Structure, Female Headship and Maintenance of Families and Poverty".

⁴⁰ Ravallion, Martin (1992): Poverty Comparisons: A Guide to Concepts and Methods. Living Standards Measurement Study Working Paper No. 88. Washington, D.C. The World Bank.

⁴¹ Kabeer, Naila (2003): Gender Mainstreaming in Poverty Eradication and the Millenium Development Goals, A Handbook for Policy Makers and Other Stake-holders, Commonwealth Secretariat, International Development Research Centre (IDRC).

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