

***Workshop on the Production of Statistics on Asset  
Ownership from a Gender Perspective through  
Household Surveys***

**Key findings from the implementation of the  
EDGE project  
(Mexico)**



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# Relevance of EDGE project for Mexico

Mexico recognizes EDGE methodology's innovations:

- incorporating the study of assets, not just income, into issues of poverty and gender inequality
- transcending the household, incorporating the individual as unit of analysis for asset ownership and rights

Mexico's become one of the first National Statistics Office to test MEXA methodology on asset ownership and contribute to the study of entrepreneurship



# EDGE project objectives for Mexico

The pilot objectives are :

- To understand to what extent the design of the EDGE questionnaire clearly conveys the concepts, provides response categories adequate for the target populations, and permits identification of sensitive and difficult questions
- To verify the feasibility of interviewing, according to field research protocols, multiple household members
- To generate UNSD proposed tabulations and indicators



# Module on the Status of Household Assets (1)

- Pilot survey was conducted as an appended module to the National Household Survey (NHS): Module on the Status of Household Assets (MSBH for its Spanish acronym).



# Module on the Status of Household Assets (2)

MSBH questionnaire includes nine topic sections:

- I) Roster of non household members
- II) Agricultural land
- III) Backyard agriculture
- IV) Animal breeding & exploitation
- V) Agricultural equipment
- VI) Other real-estate
- VII) Financial assets (savings)
- VIII) Liabilities (credits)
- IX) Entrepreneurship



# Main differences between MSBH and EDGE questionnaire\* (1)

- MSBH includes questions about the conditions in which the respondent may decide to sell or bequeath assets: independently, by agreement with someone, or with the consent of another.
- The module doesn't asked to verify physical documents accrediting legal ownership of household assets, this in order to avoid resistance of respondents or disagreements between household members for and against showing documentation.
- The registration of ownership of a particular asset is allowed for up to 3 household members and one non-household member.



# Main differences between MSBH and EDGE questionnaire\* (2)

- For the following reasons the MSBH does not ask for asset values:
  - The current situation of insecurity in Mexico makes revealing financial information particularly sensitive;
  - The enumerator- informant interactions in this type of survey (NHS) don't generate the level of confidence deemed convenient for disclosure of said information.
  - Certain geographic contexts, rural areas in particular, lack markets by which values can be estimated.



# Main differences between MSBH and EDGE questionnaire\* (3)

- In addition to the different types and forms of ownership, MSBH incorporated questions on measurement of less visible women's contribution to the household economy.
- It explores who in the household can exploit and who is charged with taking care of or preserving the assets.
- The questionnaire integrates questions on use of earnings, the destination and benefits derived from asset use, in the sections on financial assets, liabilities and entrepreneurship.



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\* *Stand Alone Survey*



# Data collection strategy

- Data collection began on 29 June and concluded 2 October 2015, for a total of 14 weeks in the field;
- Simultaneous interviews entailed a sizable increase in operating costs, required hiring and training of additional staff, as such this was not a viable option.
  - Therefore, informants were interviewed individually and separately.
- MSBH did not seek to achieve coincidence between sexes of respondents and interviewers.



# Selected respondents of MSBH

- One purpose of MSBH was to interview two adult members of the principal couple of household. (e.g. head as recognized by others and considered the most important decision-maker.)
- When there was no principal couple, or if one member was not available for interview during field research, the informant should have been supplemented by another adult household member who knew the information requested;
  - When there were multiple adults, an adult of the opposite sex with the birthday nearest to the interview date was selected for interview.



# Operating results(1)

Among the situations that most affected the information collection are:

- The absence of the informants (in 33.5% of the cases, the informants were not taken in the initial contact)
- Obtaining interviews with both members of the main couple (64.5% out of 6,977, 54.8% out of 8,204)
- The application as a module attached to the ENH.
- The duration of the interviews (CB: 30 '+ 35' of the MSBH) \*
- The realization of the interview in private with the informants.



# Operating results(2)

- The resistance and/or unwillingness to answer the second interview.
- Ignorance of the information by substitute informants.
- The difficulty to respond to aspects related to the acquisition, legal ownership or disposition of the assets, when it is not the owner thereof
- Precariousness or fragility of household assets and businesses, in correspondence with the response categories of some questions



# Key findings (1)

An observation guide was applied by a supervisor during 4,276 interviews providing an input for qualitative evaluation of the field research. According to analysis of the observation guide:

- Sixty five percent of observed interviews was obtained in the first contact, 20% of observed interviews was obtained during a second visit.
- Observations guides indicate more than three visits in 15% of households contacted (up to 9 visits).
- In order to obtain an interview, an average of 1.65 visits was made to each household.



# Key findings (2)

- The situations that most affected the efficiency of field research were: the absence of respondents and the length of interviews.
- The least fluid module sections were: IX. Entrepreneurship, VIII. Liabilities (credits) and VII. Financial assets.
- In 318 of observed interviews there were problems with the fluidity. The following 687 factors were registered as affecting the quality of those interviews:

Mistrust/ insecurity	34%	Lack of info	31%
Discomfort with question	14%	Fatigue	12%
Presence or interference of others	8%		



# Main realizations/ insights (1)

- Women and first informants were perceived more as responsive and interested in the module.
- Non-simultaneous interviews seem not to affect responses for either gender.
- Enumerator experience and technique, not a match between informant and enumerator sexes, was the basis for successful interviews.
- A section- roster for non-household members isn't necessary. Codes should be provided for identifying non-household owners' gender and relationship with the respondent.



# Main realizations/insights (2)

- It's necessary to reconsider in which question areas respondent non-owners should not answer (e.g. savings and liabilities)
- Providing a range of asset values worked well for dwellings, this could be tested for other assets
- Categories of determinants and constraints for starting a business should be adjusted to better grasp the nature of small or precarious enterprises.
- In some cases, it could be better to emphasize the quality rather than quantity of an asset (e.g. irrigation infra-structure versus land area; inclusion in formal savings systems versus amount of savings, debt burden versus credit amount)





# Main realizations/insights (3)

- The questionnaire should be adjusted for groups or categories of animals and agricultural equipment (suitable for a household survey)
- The questions on the rights to sell and bequeath assets may present difficulties when owners are still paying off the assets.
- It's important to establish a time period for registry of information about financial assets and liabilities.
- The liabilities section should be located before that of financial assets because discussion of debt provides a caveat into more private issues of savings.



## Preguntas 14.1, 14.2, 14.3 y 15. Autonomía en las decisiones de venta del terreno

14.1 ¿(NOMBRE) tiene el derecho a tomar la decisión...		14.2 ¿(NOMBRE) tiene el derecho a tomar la decisión...		14.3 ¿(NOMBRE) tiene el derecho a tomar la decisión...		15. ¿(NOMBRE) tiene el derecho a tomar la decisión...	
LEA Y ANOTE UN CÓDIGO		LEA Y ANOTE UN CÓDIGO		LEA Y ANOTE UN CÓDIGO		LEA Y ANOTE UN CÓDIGO	
1 solo(a)?		1 solo(a)?		1 solo(a)?		1 solo(a)?	
2 acordándolo con alguien?		2 acordándolo con alguien?		2 acordándolo con alguien?		2 acordándolo con alguien?	
3 con el permiso de alguien?		3 con el permiso de alguien?		3 con el permiso de alguien?		3 con el permiso de alguien?	
Nombre	N.R.	Nombre	N.R.	Nombre	N.R.	Nombre	N.R.
<i>Pilar</i>	0   1	<i>María</i>	0   3			<i>Marco</i>	5   1
2		3				1	

# Sample data

- The questionnaire was applied in 8,204 homes.
- 13,309 members of the household were interviewed.
  - 54% of the informants were women.
  - 41% of the informants correspond to rural areas.
- In 85% of the homes (6,977) was achieved the completed interview (to 2 of the household members)
- The non-response rate was 8.6%, (704) cases, of which 3.7% was due to the rejection of the interview.

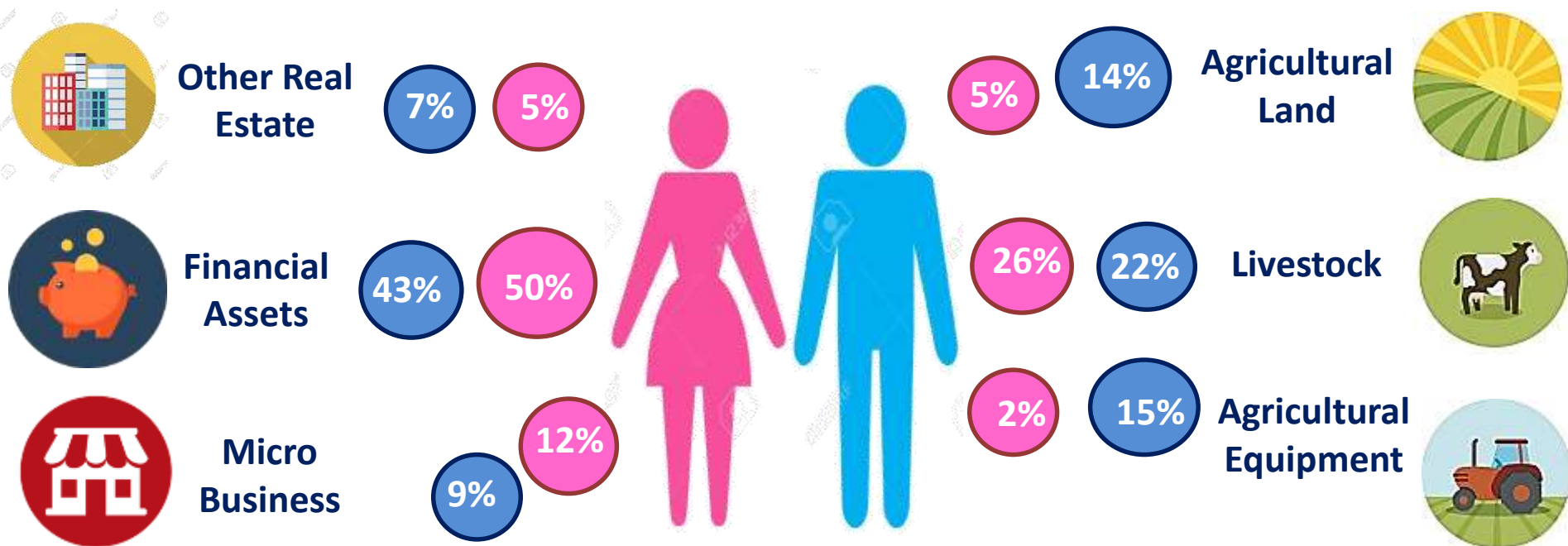


# Principal quantitative results on gender statistics



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# Household Member Owners of Assets Categories as Reported by Informants



## LAND



Reported: 5% 14%  
Legal: 3% 11%  
Economic: 10% 15%

## EQUIPMENT



Reported: 2% 15%  
Economic: 5% 15%

## LIVESTOCK



Reported: 26% 22%  
Economic: 27% 23%

## REAL ESTATE



Reported: 5% 7%  
Legal: 4% 5%

Who owns the assets?



# Sell and Bequeath Autonomous Decisions

**Table 1. Percentage of rural documented and reported owners of agricultural land and other real estate, by autonomous decisions for SELL them, by sex**

Assets	Reported Ownership		Documented Ownership	
	Women %	Men %	Women %	Men %
Land	22	32	26	33
Other Real Estate	37	39	39	41

**Table2. Percentage of rural documented and reported owners of agricultural land and other real estate, by autonomous decisions for BEQUEATH them, by sex**

Assets	Reported Ownership		Documented Ownership	
	Women %	Men %	Women %	Men %
Land	32	36	37	37
Other Real Estate	41	42	42	43



# Gender in Rural Settings: Asset Quality

Table 3. Reported Owners of Agricultural Land, by Type of Land

Type of land	Reported Ownership		Documented Ownership	
	Men (%)	Women (%)	Men (%)	Women (%)
Irrigated	12	5	13	4
Not Irrigated	63	20	65	17

Table 4. Reported Owners of Agriculture Equipment, by Type of Equipment

Agricultural Equipment Type	Reported Ownership	
	Men (%)	Women (%)
Large Equipment	3.34	0.30
Mechanical plows	2.04	0.19
Tractors	0.89	0.08
Precision seeders	0.24	0.01
Other large equipment	0.17	0.03
Small Equipment	11.82	1.96
Agricultural tools	0.82	0.07
Other small equipment	10.99	1.89
Total general	15.15	2.27





# Gender in Rural Settings: Quality of assets

Table 5. Reported owners of Animals, by animal category

Type of Livestock	Reported owners	
	Men (%)	Women (%)
<b>Large Livestock</b>	8.20	2.56
Steer, Cows, Bulls, etc.	3.75	1.47
<b>Draught Animals</b>	4.45	1.09
<b>Small Livestock</b>	7.06	6.57
Pigs	3.87	4.23
Goats/ Sheep	2.57	1.84
Rabbits/ Guinea Pigs	0.33	0.42
Fish Ponds (fish farming)	0.05	0.03
Bee Hives	0.24	0.05
<b>Poultry</b>	7.55	17.82
Chickens, Hens, Roosters, Ducks, Geese	6.21	14.43
Turkey, Quail	1.34	3.39
Other	0.11	0.05
<b>Total</b>	<b>21.90</b>	<b>26.00</b>



# Decision-making on agricultural production and husbandry

**14%** Population of reported-land-owners who decide what and how to crop. **65%**

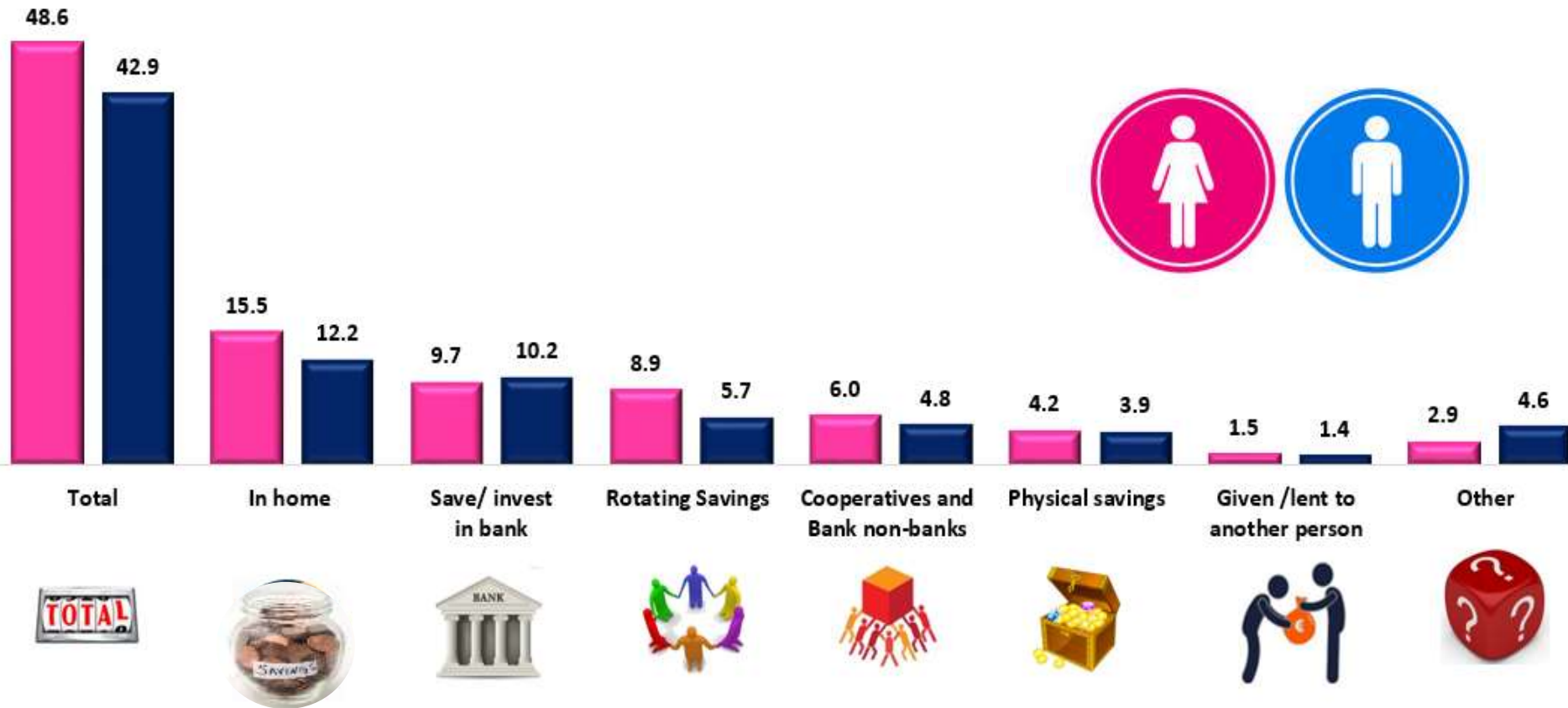
**7%** Incidence in decision-making on use of money from the crop sales. **25%**

**4%** HH Members decision-makers in charge of when to sell or consume the produce. **6%**

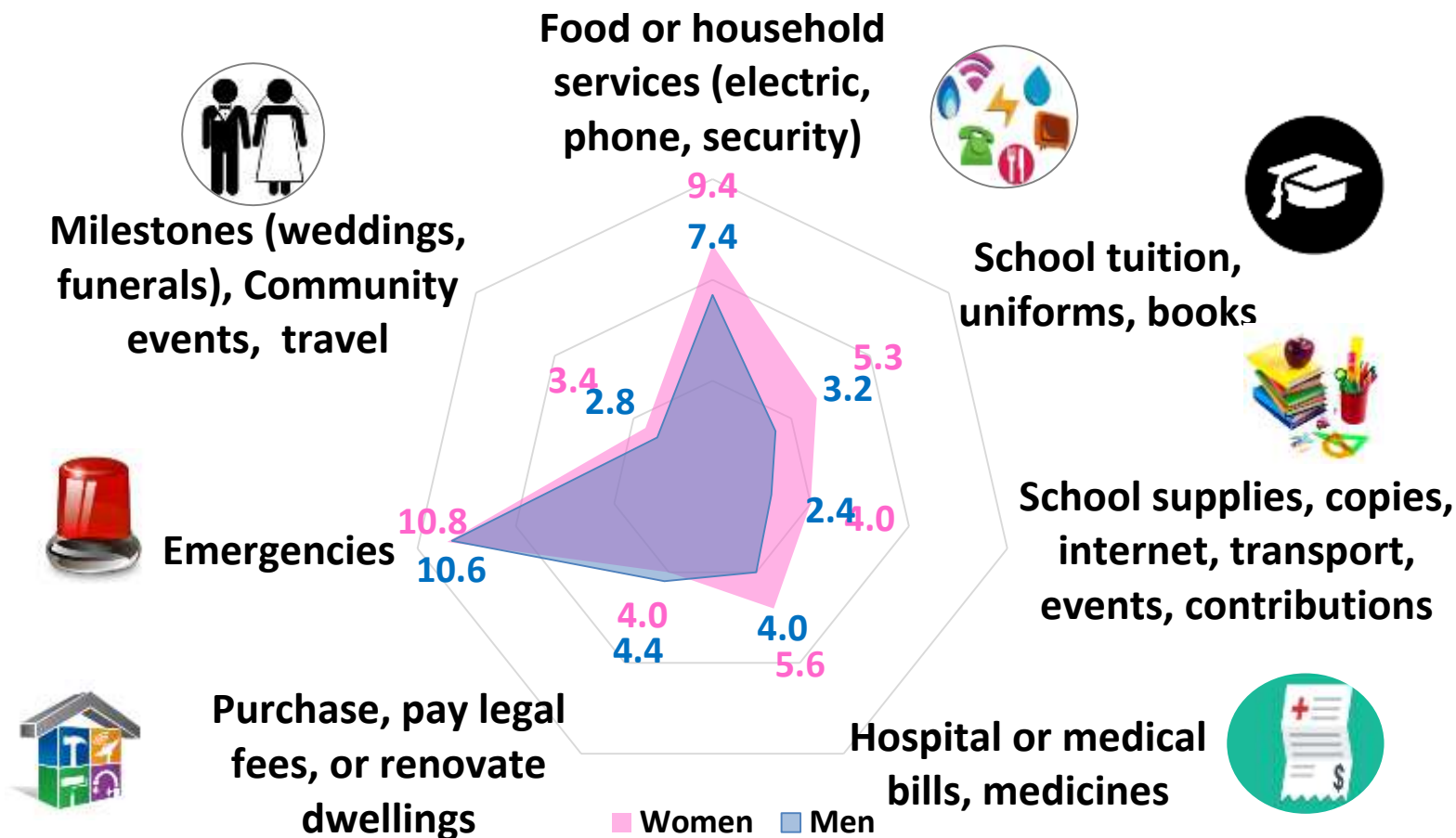
**27%** HH Member animals owners with declared rights to sell and slaughter **23%**



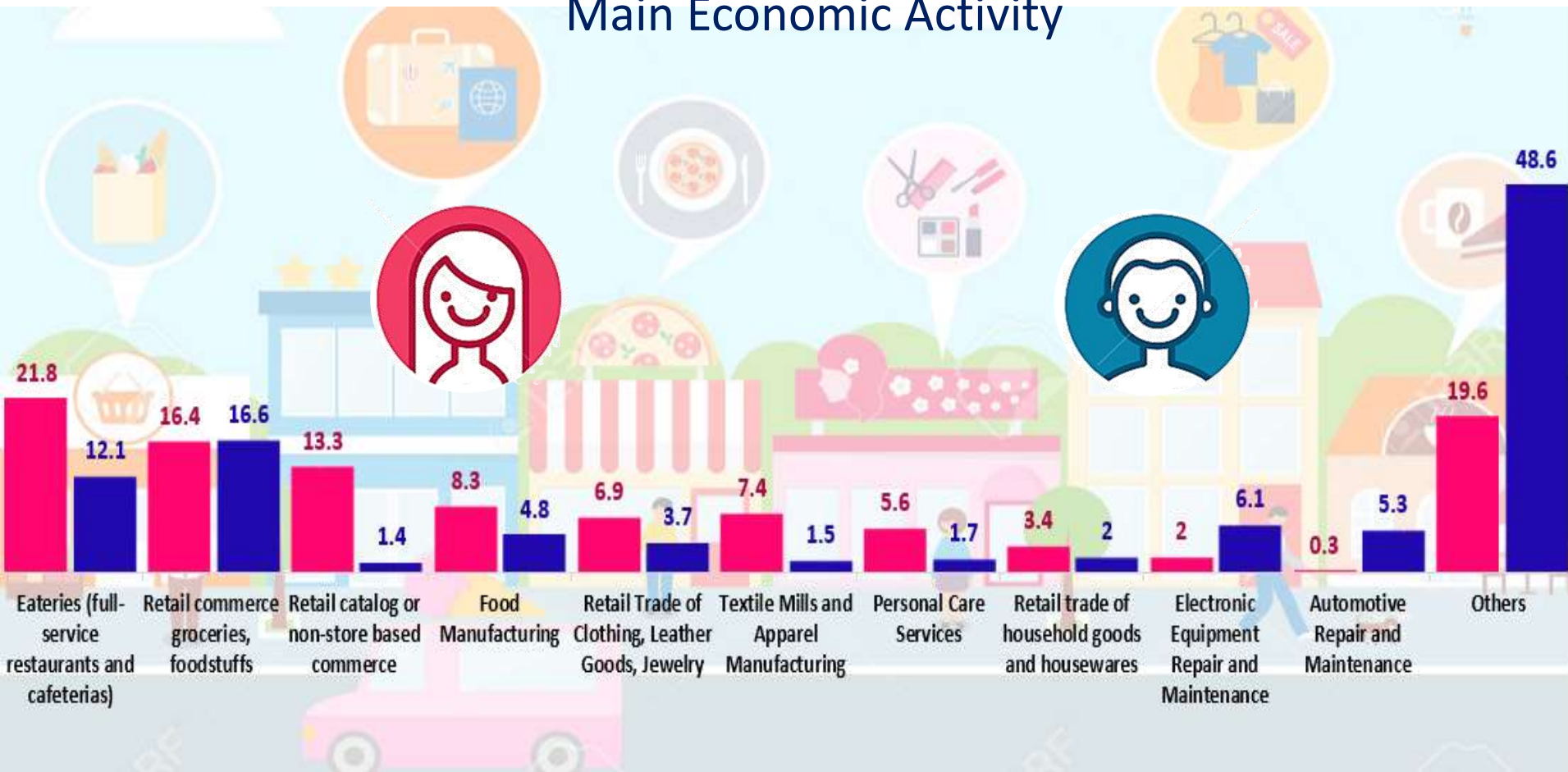
# Financial Assets: Percentage of Savers Deciding for What and How Much to Save, by Savings Mechanism



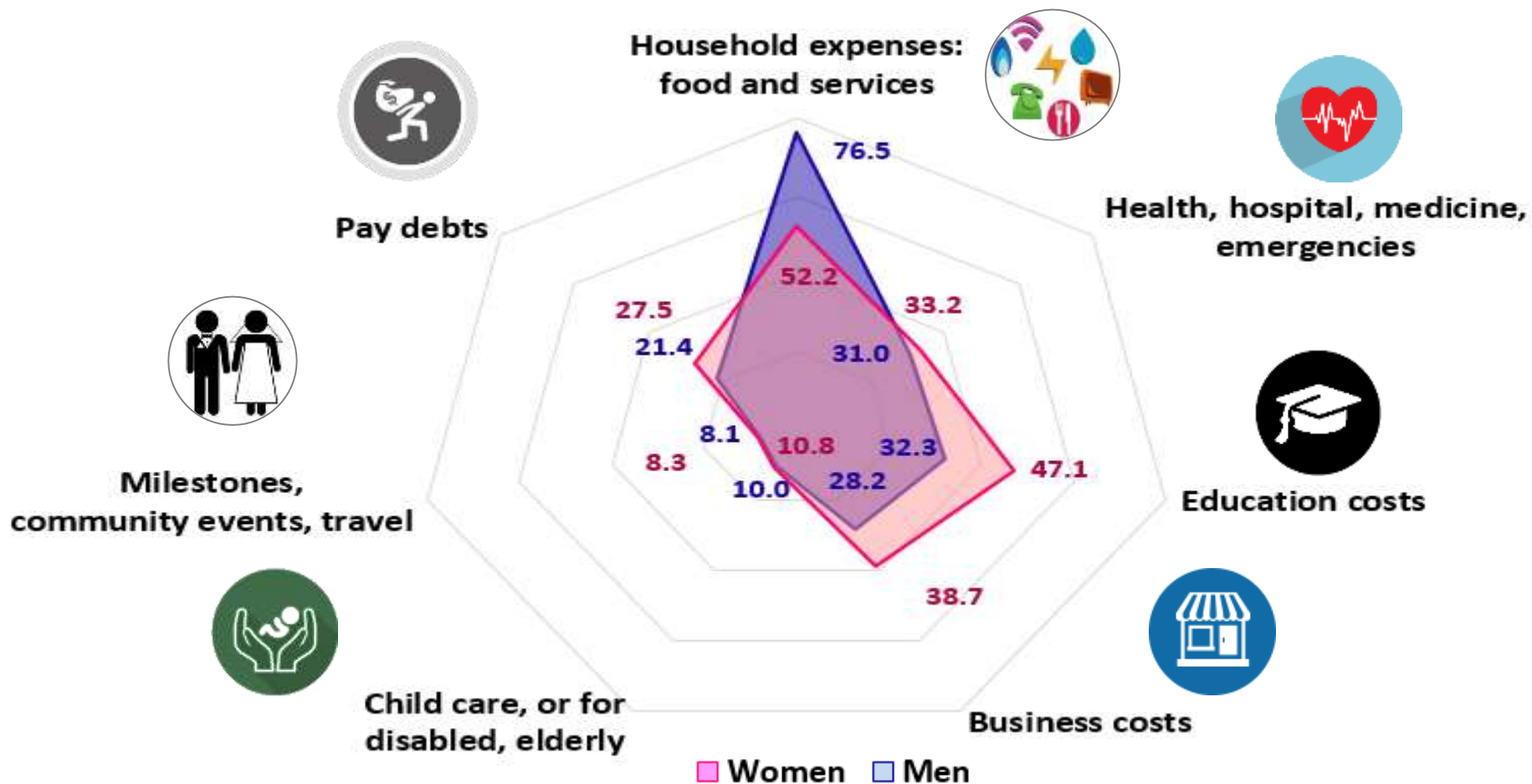
# Financial Assets: Percentage of incidence for savings purposes, by sex



# Percentage of Gender Distribution for Entrepreneurs by Main Economic Activity



# Percentage of incidence for use of enterprise earnings to cover half or more of a given expense, by sex



# Some Conclusions (1)

- Reported, documented and economic ownership is substantially more prevalent among men across the vast gamut of assets studied, with a more exacerbated unequal asset distribution in rural areas.
- There is a greater incidence of economic owners than reported owners, and a greater incidence of reported than documented owners.
- The importance of legally recognized ownership shines as an important factor for understanding women's standing—especially in rural areas.
- Legal ownership relates positively to autonomous decision-making on issues of sales and bequeathal of women's declared agricultural land.



## Some conclusions (2)

- Women were responsible for the care of animals for which they reported ownership and made autonomous decisions on their sales and use of proceeds.
- Women save more frequently and use more diverse savings mechanisms than men, but appear to have lesser access to formal instruments than men.
- Women have a lesser presence as legal owners but become significant players as economic owners (defined as owners with decision-making on how to use the asset proceeds).
- For all areas of asset based decision-making, women's day to day participation in asset management (what and how much produce and sell), is disproportionately inferior to their incidence as owners.
- Looking ahead, improved conditions for women's legal ownership would enhance their full participation and control for their own and their household's benefit.



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