



# MEXA Overview and Questionnaire Construction

**EDGE Project**

Social and Housing Statistics Section - UNSD



## Outline

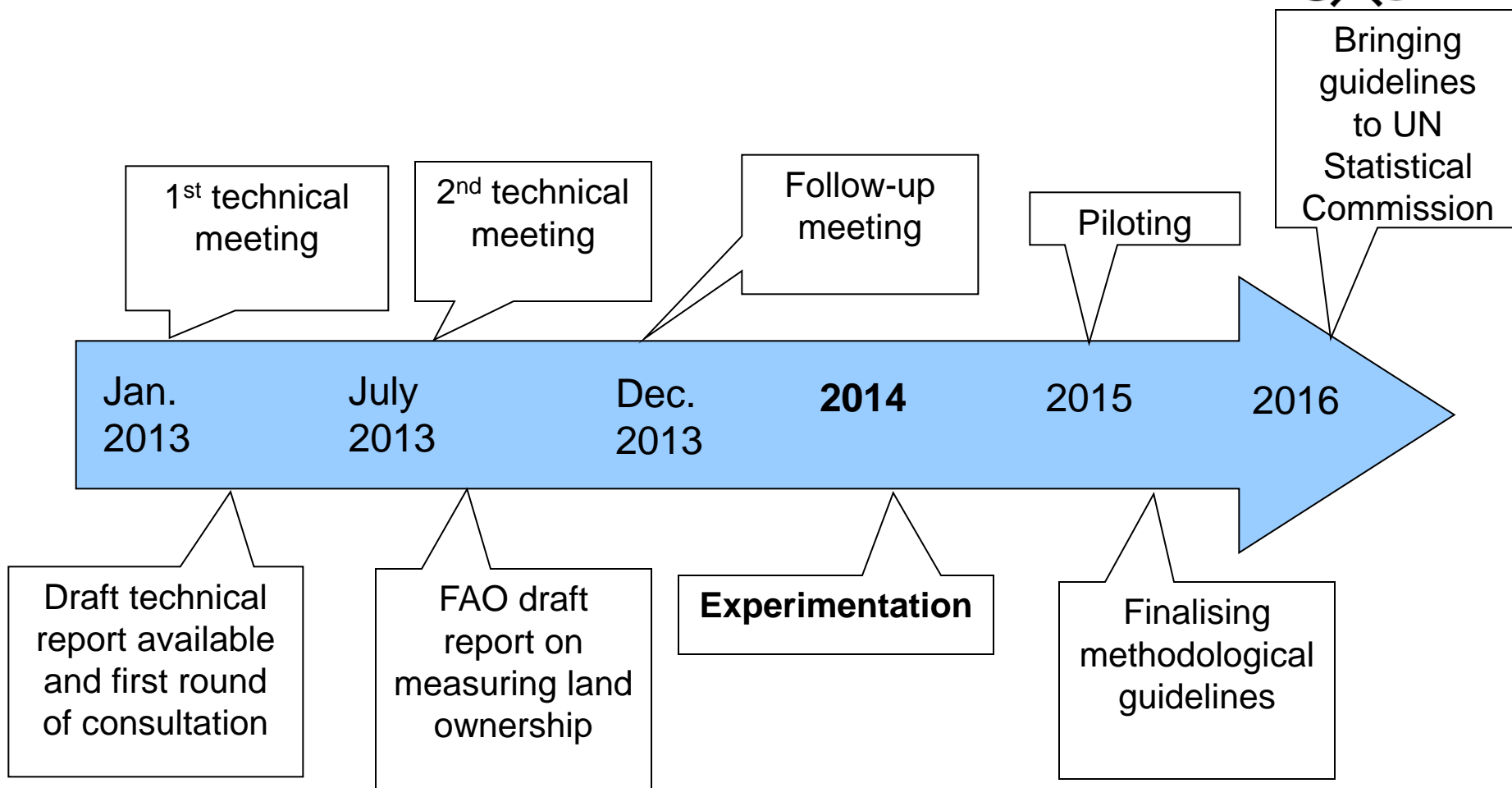
- MEXA overview
  - Impetus
  - Interview settings
  - Sampling design
- Questionnaire design
  - Asset coverage
  - Key concepts operationalized
- Preliminary analysis of questionnaire and implications for pilot modules
- Tentative indicators



# MEXA Overview



# Timeline of Work on Asset Ownership



## 2<sup>nd</sup> Technical meeting: main items discussed



### How to measure ownership?

- Ownership conceptualized as a **“bundle” of rights**
  - Includes rights to alienate and manage assets and use benefits from assets
- Bundle of rights may not accrue all to same person
  - Women may have, e.g.:
    - access to asset but no formal ownership
    - formal ownership but no control over asset
  - How rights are vested varies across contexts



## Main items discussed (cont'd.)

### Who to interview?

- Does interviewing head of household or self-identified most knowledgeable household member yield accurate information on asset ownership, control and valuation?
- Should principal woman always be interviewed?
- No systematic studies on these questions
- ✓ **Recommendation by NSOs to test household interview settings**



## MEXA

- Collaboration between UN EDGE, World Bank LSMS and UBoS
- Implemented in Uganda in 2014
  - Expert consultation and questionnaire design, January
  - Training of enumerators, April-May (3 weeks)
  - Data collection, May-August
- Findings to:
  - Inform data collection in 2015 by pilot countries
  - Inform final methodological guidelines to be presented to UN Statistical Commission in 2016



## Treatment arms/Interview settings

1. **Most knowledgeable self-identified** HH member, interviewed alone, asked about assets **all HH members** exclusively/jointly own
2. **Member** of principal couple randomly selected, interviewed alone, asked about assets **all HH members** exclusively/ jointly own
3. Principal couple, **interviewed together**, asked about assets **all HH members** exclusively/jointly own
4. Adult (18+) HH members (up to 4), each interviewed alone, asked about assets **all HH members** exclusively/jointly own
5. Adult (18+) HH members (up to 4), each interviewed alone, asked only about assets **respondent** exclusively/jointly owns





## Sampling design

- **140** Enumeration Areas (EAs) selected with probability proportional to size across the country
  - Actual EAs interviewed: 137
- **Rural/Urban** EA Split: **60/40** percent
- In each EA, **20** HHs selected from current HH listing through systematic sampling with random start
- **4** HHs randomly allocated to each of the 5 treatment arms in each EA
- Initial allocation of households **per treatment arm: 544**
- Total HHs actually interviewed: **2,027**



# Questionnaire design



## Questionnaire structure

Module	Respondent
Household roster	Any household member
Dwelling characteristics	Any household member
Principal dwelling	Respondent identified in treatment arm
Agricultural land	
Livestock (large and small)	
Agricultural equipment (large and small)	
Non-farm business assets and enterprises	
Other real estate	
Consumer durables	
Financial assets and liabilities	
Valuables	



## Additional features of questionnaire

- Questionnaire implemented on Android tablets via Computer Assisted Personal Interviewing (CAPI) software developed by the World Bank
- Network roster allows for the identification of (up to 2) non-household members (sex, age, relationship to respondent) as:
  - joint owners of an asset
  - persons from whom an asset was acquired
  - persons from whom permission/consent is needed to exercise a right to an asset



## Key concepts operationalized

Bundle of Rights	Relevant Assets	Questions
Documented ownership	Principal dwelling Agricultural land Other real estate	Is there an <b>ownership document</b> for this [asset]?
		(If yes), whose name(s) are <b>listed as owners</b> on the ownership document for this [asset]?
		Enumerator: Was the respondent able to <b>produce the documentation</b> for confirmation purposes?



## Key concepts operationalized

Bundle of Rights	Relevant Assets	Questions
Reported Ownership	All assets	Who owns this [asset]?
Economic ownership	Principal dwelling, agricultural land, large agricultural equipment, non-farm business assets and enterprises, other real estate	If this [asset] were to be sold today, who would <b>decide</b> how the money is used?



## Key concepts operationalized

Bundle of Rights	Relevant Assets	Questions
Rights to assets	Principal dwelling, agricultural land, large agricultural equipment, non-farm business assets and enterprises, other real estate	<p>With regard to this [asset], who has the right to <b>sell/bequeath/use as collateral/rent out/make improvements</b> to it?</p> <p>Does the person need <b>permission or consent</b>?</p> <p>(If yes), <b>from whom</b> does the person need permission or consent?</p>



## Additional data items collected

Data Item	Relevant Assets	Questions
Mode of acquisition	Principal dwelling, agricultural land, large agricultural equipment, non-farm business assets and enterprises, other real estate	How did the owner(s) acquire this [asset]?  <b>(If inherited/allocated by family member/gifted by non-family member), from whom did the owners receive the [asset]?</b>





## Additional data items collected

Data Item	Relevant Assets	Questions
Asset value	Principal dwelling, agricultural land, large livestock, large agricultural equipment, non-farm business assets and enterprises, other real estate, financial assets and liabilities	<p>If this [asset] were to be <b>sold today</b>, how much could be received for it?</p> <p>Do individuals sell/rent out [asset] in or around this community?</p> <p>Are you informed regarding the value of recent sales/rental transactions of [asset]?</p>



## Additional data items collected

Data Item	Relevant Assets	Questions
Hidden assets	Agricultural land, large agricultural equipment, non-farm business assets and enterprises, other real estate, financial assets and liabilities	Asked only if respondent is owner of [asset]:  Are there any household members >18 who <b>do not know</b> about your ownership of this [asset]?  (If yes), which household member(s) >18 <b>do not know</b> about your ownership of this [asset]?



# Preliminary analysis of questionnaire and implications for pilot modules



# Preliminary analysis of questionnaire

## Total Interview Duration (Minutes), by Treatment Arm

Interview Setting	Mean	Median	Min	Max
Self-identified most knowledgeable	35.8	31.5	5.5	130.8
Randomly selected member of principal couple	35.9	30.6	5.3	124.3
Principal couple (together)	38.7	36.0	6.8	117.6
All adult household members alone asked about all assets HH members own	34.0	31.1	5.4	131.6
All adult household members alone asked about assets respondent owns	29.0	24.0	5.3	131.2
<b>Overall</b>	<b>33.6</b>	<b>29.5</b>	<b>5.3</b>	<b>131.6</b>



## Preliminary analysis (cont'd.)

- Network roster
  - Useful from research perspective to analyze patterns of joint ownership and from whom men and women acquire assets
  - But network roster is used **only to qualify** a household member's joint ownership
  - **Not used** in the **calculation** of joint ownership indicators due to potential for double counting or in the measurement of mode of asset acquisition
- ✓ Recommendation: Only necessary for pilot countries to include 1 code to capture non-household members who may jointly own assets. Detailed network roster not necessary



## Preliminary analysis (cont'd.)

- Rights to assets and permission/consent:
  - Strong correlation across rights to sell/bequeath/use as collateral/rent out/make improvements to [asset]
  - Rights to sell/bequeath are most robust forms of alienation, and thus most theoretically relevant from gender perspective
  - Concepts of permission and consent were difficult to intuit and operationalize in both training of enumerators and pre-testing of questionnaire
- ✓ Recommendation: Necessary to include only rights to sell and bequeath in pilot modules, irrespective of permission/ consent



## Preliminary analysis (cont'd.)

- Valuation of assets
  - Gender wealth gap accounts for quantity and quality of assets and extent to which these may differ between women and men
  - But valuation data are prone to measurement error and may be less reliable than ownership data
- ✓ Recommendation: Pilot countries should collect information on asset values to assess feasibility and reliability of collecting valuation data beyond pilots



## Preliminary analysis (cont'd.)

- Hidden assets
  - Low incidence in Uganda except for financial assets and liabilities and no significant gender differential
- ✓ Recommendation: Countries implementing stand-alone pilot surveys should collect information on hidden assets to assess extent to which interviewing specific household members may capture/fail to capture full household inventory of assets in different country contexts





# Tentative Indicators



## Tentative key indicators

Concept	Indicator
Reported ownership	Percentage of adult population owning [asset], by sex
Economic ownership	Percentage of adult population with economic ownership of [asset], by sex
Rights to assets	Percentage of adult population who have right to sell/bequeath [asset], by sex
Acquisition of assets	Mode of acquisition of asset, by type and sex of owner
Gender wealth gap	Comparison of the share of asset value owned by women with that of men



Thank you!