

United Nations

Technical Meeting on Measuring Asset Ownership from a Gender Perspective

30 July – 2 August 2013

Bangkok, Thailand

Background and objectives of the meeting

1. The United Nations Statistics Division (UNSD) and the United Nations Entity for Gender Equality and the Empowerment of Women (UN Women), in collaboration with the Statistics Division of the United Nations Economic and Social Commission for Asia and the Pacific (UN ESCAP), organized a Technical Meeting on Measuring Asset Ownership from a Gender Perspective. The meeting was organized under the Evidence and Data for Gender Equality (EDGE) project and brought together national statisticians, partner agencies and regional commissions to discuss the draft *Technical Report on Measuring Individual Level Asset Ownership and Control* (referred as the *Technical Report* hereafter).
2. Survey specialists and gender statisticians from the National Statistical Offices (NSOs) of nine countries attended the meeting: China, Georgia, Ghana, Maldives, Mongolia, the Philippines, Rwanda, Uganda and Vanuatu. The meeting was also attended by experts from donor agencies of Australia, United States, and from the Asian Development Bank, the African Development Bank, FAO, and the Statistics Division of UNESCAP.
3. The meeting had three key objectives:
 - a. Receive feedback from national statisticians on the applicability/feasibility of the draft methodology (the *Technical Report*) proposed under the EDGE project to measure asset ownership at the individual level for gender analysis; and on their capacity to apply the proposed international methods;
 - b. Exchange and share good practices and lessons learned on this topic based on Existing research, experiences gained in selected national statistical offices and partner agencies;
 - c. Promote the integration of a gender perspective into national statistical systems with the aim of improving the availability and quality of gender statistics, including on “emerging issues” such as asset ownership and control.

Organization of the meeting

4. The meeting covered the following topics:

Session 1: Harmonizing gender indicators, including on entrepreneurship and asset ownership

Session 2: Why measure asset ownership and control at individual level – importance for policy making

Session 3: Current approaches to measuring asset ownership and control

Session 4: EDGE draft Technical Report on Measuring Individual Level Asset Ownership and Control: What to measure?

Session 5: EDGE draft Technical Report on Measuring Individual Level Asset Ownership and Control: How to measure?

Session 6: EDGE draft Technical Report on Measuring Individual Level Asset Ownership and Control: Proposed questionnaire and the way forward

Conclusions of the meeting:

5. The meeting took note of the key activities undertaken under the Global Gender Statistics Programme, implemented by UNSD in collaboration with the Inter-agency and Expert Group on Gender Statistics (IAEG-GS). The meeting was also informed of the establishment of a minimum set of gender indicators, approved by the UN Statistical Commission in 2013, as a guide for countries to produce gender statistics and for the compilation of internationally comparable gender indicators, including on emerging issues such as asset ownership and control.

6. The meeting welcomed the EDGE initiative and the draft Technical Report presenting the draft methodology for collecting data on asset ownership and control at the individual level. The meeting stressed the importance of developing a methodology proposing data collections that focus on the gender aspect of asset ownership; are cost effective; are sustainable and can be integrated in existing national data collection mechanisms, through the addition of a module, or a list of questions. The proposed methodology should also be based as much as possible on concepts and definitions in line with other international standards such as the System of National Accounts-SNA. The methodology should aim at providing detailed asset data, relevant at country level and sensitive to its context and norms, as well as data that are internationally comparable, at least at a certain level of aggregation.

7. For the meeting, FAO prepared a draft paper and made a presentation on its recent experiences with incorporating a gender perspective into agricultural censuses and surveys, with particular reference to agricultural land. These experiences have occurred principally within the framework of the Program of the World Census of Agriculture (WCA). The presentation: highlighted key WCA aspects for the analysis of the gender gap in land ownership; summarised the review to date of WCA 2010 national experiences with gender; presented tools for sex-disaggregated data collection of land ownership and management, and; proposed issues and topics for consideration and discussion by the meeting. In the follow-up discussions between EDGE and FAO representatives, it was agreed that FAO and EDGE will collaborate in order to ensure harmonisation of concepts and codes in the EDGE pilot study with FAO concepts and recommendations in WCA. In addition, EDGE will follow up and update FAO on the current situation vis à vis UNSC indicators and reporting requirements for which FAO will be responsible. These indicators and reporting requirements will be a powerful rationale for inclusion of a stronger gender dimension into WCA 2020 and

for encouraging greater collaboration between national statistical systems and gender-oriented stakeholders during various stages of the census process.

8. The meeting discussed extensively: (a) the importance of measuring asset ownership and control from a gender perspective;(b) which assets to consider due to their relevance for gender analysis; and (c) how to collect gender sensitive asset data in an effective and sustainable way. Below is a summary of key points the meeting discussed on each of the topics above:

(a) Why measuring asset ownership from a gender perspective?

9. Assets people own are an essential component of their welfare and they serve different functions including (a) determining social status and security; (b) producing goods and generating incomes; (c) representing accumulated wealth and (d) providing buffer against shocks. In particular the sex disaggregated asset ownership data monitor gender equality, women's empowerment and human development. It was emphasized that sex disaggregated asset ownership data may answer many policy relevant questions, for example, on the difference of women and men in owning assets in quantity and quality; on the differences in acquiring, using and disposing of assets; and to understand how differences in asset ownership affect the productivity of women in agriculture and business. Asset ownership from a gender perspective also provides a good indicator of poverty and poverty dynamics and may be easier to obtain than using sex-disaggregated income data. Asset ownership data at individual level are also important for National and international monitoring of national progress and for estimating capital formation in the household sector assets for the System of National Accounts. Users of sex-disaggregated asset ownership and control data include government agencies, international partners, women's organizations, researchers, NGOs and financial institutions.

(b) What to measure: Which assets to include, how to define each type of asset, which additional information to collect, the importance of knowing the specific country context through qualitative research

Which assets to include

10. A number of core assets were identified and they include: (a) land including agricultural and non-agricultural land; (b) dwelling for principal residence; (c) other real estate; (d) agricultural equipment/machinery/structures including those that are functional and used for cultivation or processing; (e) livestock and poultry; (f) household materials/consumer durables and valuables; (g) financial assets including savings account, stocks and bonds, pension, credits and liabilities; and (h) other assets for household non-farm enterprises (including structures/buildings and equipment for the enterprise).

11. Other types of assets were also discussed during the meeting including intellectual properties such as copyright. It was recommended that this could be treated as additional asset should a country feel it is very important for its circumstances.

12. It was emphasized during the meeting that categories and sub-categories of assets should be selected so they (a) reflect, as much as possible, the gender perspective; and (b) facilitate international comparison. It was agreed that all of the above eight categories of assets should be treated as core assets. Data on a few key consumer durables would be collected across countries for comparability, while each country can cover additional consumer durables. However flexibilities should be allowed in including or excluding certain sub-categories of each core asset, subject to national applicability.

Type of ownership to measure

13. There are many type of ownership that can be captured in a sample survey. They include (a) reported ownership; (b) documented ownership; (c) control over the asset in terms of rights to sell/rent or to bequeath, (d) economic ownership-who derives financial benefits from assets and (e) access or use rights. The type of asset ownership that should be captured to reflect, as much as possible, the gender perspective, varies by asset. For example, documented ownership may only be relevant for land and dwellings.

Background information to collect

14. There are three types of information that should be collected to maximize the use of sex-disaggregated asset ownership data: (a) basic demographic information pertaining to the household and individual; (b) information reflecting women's empowerment; and (b) asset-ownership related variables that help better understanding the characteristics of assets, the ownership and the value of assets.

15. Important demographic information includes: household composition (for the understanding of the relationship of the respondent to reference person); sex, age, education attainment, employment status, income, marital/partnership status, duration of marriage or union, marital/partnership history (for inheritance), whether polygamous family and length of stay in the house.

16. Given the importance of analyzing the relationship between women's empowerment and asset ownership, the meeting suggested that additional information on women's decision making on specific areas such as health care, spending on education should be collected. Appropriate questions should be added if not already present in other parts of the questionnaire of the survey to which the asset ownership module will be attached.

17. Important asset-ownership related variables vary by the type of asset. For example, location and size are important for land and dwellings. Equally important for dwelling is the number of years that it has been built. To understand the gendered patterns of asset acquisition, it is useful to have information on how the major assets were acquired.

18. Recording of interview setting is also important. In particular, it is important to know who was present during the interview. Was the respondent alone? Was the respondent distracted? Was she taking care of the baby?

Contextual information to be collected

19. Contextual information, in a survey that collects individual-level asset ownership data, defines how questions should be asked and how data are analyzed and interpreted. The contextual information is also important in training the interviewers so they can verify, during the time of interview, accuracy of reported information. The meeting agreed that contextual information such as (a) laws and norms regarding marital property; (b) laws and norms on inheritance; (c) forms of land tenure; (d) people's understanding of ownership; and (e) relevant categories of joint ownership.

20. It was noted that the best way to collect such information is to conduct qualitative studies and focus group discussions before the survey field work is undertaken.

Local language translation of questionnaires for certain concepts (e.g. ownership/control/management)

21. The concepts of ownership, control and management are very complicated to understand, especially for countries that have multiple local languages. And due to the fact that slight changes in wording of the questions might bring big differences in responses, it is advisable to translate those asset ownership related questions into at least major regional languages. It is important not to leave too much flexibility for the interview to interpret the questions, to ensure consistency in the answers. It would also be useful to have the interviewers teamed together with people who understand the region for the interview.

(c)How to measure: Who to interview, how to value assets, special training of interviewers, which data sources to use

Who to interview

22. Different mechanisms were discussed extensively in terms of who to interview when collecting asset ownership data at individual level. Those include interviewing (a) the principal couple in the household together; (b) principal couple in the household separately; (c) two people, consisting of a principal man and woman or the most knowledgeable man and woman in the household; (d) the head of household or the most knowledgeable person in the household and (e) one person (man or woman) selected randomly from households.

23. The group agreed that the selection of the most appropriate interviewing setting should be based on the following criteria:

- a. Objective of the data collection. As the basic objective of the study is to estimate the asset ownership at the individual level, then interviewing one man or one woman from the household might be sufficient. If we want information from the respondent about their individual rights and decision-making regarding assets, then the respondent may need to be randomly selected. However if there is also an interest in understanding intra-household/couple decision making power, then interviewing both members of the principal couple might be preferred.

- b. Sustainability of the methods – the proposed method should be easily integrated into Existing national survey Programs;
- c. Comparability among countries;
- d. Cost-effectiveness. Will the added complexity of the interview-setting provide relevant and easy to interpret information? Having multiple respondents from a same household will result in discrepancies in answers in terms of who owns/controls an asset that will require rules for reconciliation.

24. The group discussed possibilities of using the EDGE project as a vehicle to test different interviewing settings (who to interview). Results of the testing will provide input to an internationally-agreed methodology in collecting asset ownership at individual level. Information on cost and resource needed will also be taken into consideration. Once tested and approved by the pilot countries, the methodologies should be able to be used in nationally representative household surveys.

Valuation of assets

25. In terms of valuation of assets, the group agreed that valuation applies more to certain assets such as land, dwellings, agricultural equipment and selected consumer durables. The most challenging values to derive are those for land and dwellings. In general the System of National Accounts method – how much it will cost if you sell it today – is preferred. To obtain the best estimate of values, it was suggested that training of interviewers is crucial so the interviewers is familiar with the real estate market for the areas they are responsible so erroneous responses can be detected at the interview.

26. The discussion also covers how to work with countries that do not have established market for land and dwellings or where tenure type precludes so. This is particularly relevant for pacific island countries and the technical guideline produced should provide guidance on how to obtain values for these countries.

27. The group also commented that administrative sources (or ICP that provides information on rental), although not always accurate, could be used as a secondary source to evaluate the accuracy of the values derived from household surveys. Collecting relevant characteristics of the land and dwellings, such as size, age of the dwelling, construction material used, location etc, can be used to validate, impute or revise the values obtained from the respondents.

28. Formulation of the valuation questions should take into consideration the sensitivity related to values attached to assets, especially financial assets. One suggestion is to only asking for responses in broad monetary categories rather than in exact number. Some countries may want to skip valuation questions altogether.

Training of interviewers:

29. It was stressed that training of interviewers is crucial for obtaining accurate information on asset ownership at individual level. Certain elements for the asset questions need special training of the interviewers. They include:

- a. Recording of who the respondent(s) is

- b. If the survey is to interview a randomly selected (male/female pre-determined), special training is needed to make sure the interviewers identify the right person;
- c. Skip patterns. The interviewers should be familiarized with the skip patterns of the asset questions.
- d. Second respondent and verification. If there is a second respondent in the same household, training should also focus on how to obtain the “most accurate” answers and what to do if there is difference in reported assets and asset ownership.
- e. Avoid double counting of assets
- f. Contextual information; relevant terms and definitions; and different types of legal documents related to asset ownership.
- g. Obtaining the value of assets may be complicated in nature and interviewers should be trained on how to minimize non-response and to improve accuracy of the data.
- h. Consideration of safety issues when responses may generate conflict
- i. Timing of the interviews

Review of the proposed questionnaire

30. The meeting reviewed and discussed the proposed set of draft questions. Comments received will be reflected in the revised version of the asset module.

The way forward :

Learning from previous exercises

31. Given the fact that the Gender Asset Gap Project (GAGP) was conducted in three countries using stand-alone household surveys, the meeting recommended to better understand lessons learnt from GAGP and consider them in the development of the EDGE project methodology. This is particularly important for answering the question on “who to interview” as the GAGP interviewed two persons in each households and studying the difference in responses between the two persons would be instrumental to the EDGE project asset ownership methodology.

32. The table below summarizes the work plan/key activities discussed and agreed at the meeting:

Year	Activities
2013	<i>Technical Report on Measuring Individual Level Asset Ownership and Control</i> finalized, with options on certain operational elements
	Pilot countries begin conducting qualitative study on contextual information and provide list of activities and related cost estimates for piloting module/questions on asset ownership
	EDGE to commission additional study on lessons learned from the GAGP
2014	Experiment field operation with different options (China, Philippines, Uganda)
	Collecting asset ownership data through questions (or a questionnaire module) in Uganda and Ghana
	Contextual information available for all EDGE pilot countries

2015	Collecting asset ownership data through questions (or a questionnaire module) in China, Georgia, Philippines, Mongolia, Vanuatu, Maldives, Rwanda
	Data analysed and disseminated
2016	International guidelines on collecting data on asset ownership at individual level presented and approved by the UN Statistical Commission
	The Minimum Set of Gender indicators on asset ownership moved from Tier-III to Tier-II

Potential surveys for the EDGE piloting

33. All of the participating countries expressed their interest in becoming part of the EDGE project, to Pilot the proposed new methodology. Upcoming household surveys will be fielded between 2014 and 2015 (See annex-table x). It was indicated that some of the pre-testing (on questionnaire design and question formulation) may be carried out in 2014.

Country	Potential survey(s) for EDGE piloting
China	Integrated Household Survey 2014; Agricultural Census 2016
Georgia	Integrated Household Survey April 2015
Ghana	Household-based agricultural census 2014; household-based integrated enterprise survey 2014; LFS 2015 (maybe)
Maldives	Household income and expenditure survey 2015
Mongolia	Household Social and Economic Survey 2015 (pre-testing of questions may be done in 2014)
Philippines	In a module of LFS January or October 2015
Rwanda	Integrated Household Living Condition Survey (EICV5, 2016)
Uganda	Annual Panel Household surveys; consumption and other surveys (household-based)
Vanuatu	Household Income and Expenditure survey 2015

Example of an EDGE pilot country implementation plan

Activities	Timetable*	Agency Responsible
I. Planning and Preparatory		
1. Establishing country team	August 2013	NSO
2. Development of analytical framework 3. Review of existing surveys	September 2013	NSCB, NSO
4. Consultation w/ data users	October 2013	NSCB, NSO
5. Partnership agreement w/ ADB/institutional arrangements	December 2013	
6. Development and pretest of questionnaire as hh survey module	1 st Semester 2014	
7. Revision and finalization of survey instruments to include sampling design, questionnaire, training manuals	2 nd Semester 2014	
II. Pilot Survey		
1. Training	2nd quarter 2015	
2. Data Collection	October 2015	
3. Supervision	October 2015	
4. Field editing	October 2015	
III. Post Pilot Survey Activities		
1. Manual editing 2. Machine processing	November 2015 December 2015	
3. Analysis of results 4. Preparation of technical results, factsheets	January 2016 January 2016	
5. Publication 6. Dissemination of results	1 st quarter 2016 1 st quarter 2016	
7. Documentation	2014-2016	

- In 2015, a mid decade census will be conducted in May and a family income and expenditure survey, in July.

Bangkok, 2 August 2013