Module 1
Gender statistics and gender analysis

1.1 Introduction

Gender statistics is not a discrete or isolated field. It relates to all fields of statistics and is a tool to facilitate the change needed to address gender issues. Identifying the information required to inform and understand the problems and goals connected with gender issues is essential to the production of gender statistics. Therefore, a policy-oriented approach rather than the simple disaggregation of data by sex is at the core of gender statistics.

Gender statistics is a field of statistics which cuts across the traditional fields to identify, produce and disseminate statistics that reflect the realities of the lives of women and men and policy issues relating to gender equality.

The development of gender statistics involves the same steps as the production of other statistics, but with specific regard to integrating gender issues and reflecting gender concerns. As Hedman et al. (1996) have already established, the main steps include:

a) selection of topics to be investigated
b) identification of statistics to be collected to reflect the gender issues in society
c) formulation of concepts and definitions that adequately reflect the diversities of women and men in society
d) development of data collection methods that take into account stereotypes and social and cultural factors that might produce gender-based biases
e) development of analyses and presentation of data that can reach policy makers and the largest audience possible.

This chapter will focus on some of the basic issues and challenges that are involved with developing gender statistics.

1.2 The importance of a gender perspective in statistics

The first challenge faced by advocates of a gender perspective in statistics is to convince statisticians, and sometimes even some potential users, of the importance and feasibility of this field of work. Many argue that gender is already fully incorporated in statistics or that it is not necessary since women and men already have equal opportunities in society (see Box 1.1 on frequently used arguments). This manual argues that a gender focus not only provides evidence of gender differences, but strengthens and improves the whole statistical system. Women and men continue to have different roles in society, different access to and control over resources and different skills and interests. Unless these differences are reflected in official statistics, statisticians will not fulfil adequately their mandate.

A starting point in the discussion of developing gender statistics is the distinction between two terms which are often confused: sex and gender. The difficulty of translating the term gender into languages other than English further contributes to the confusion in the use of these terms. Sometimes the simple categories of sex (male and female) and gender (masculine and feminine) are treated as if they were the same thing. They are not. Sex is a reference to the relatively fixed biological and physiological characteristics that define men and women. Gender is a reference to the relatively fluid socially constructed roles, behaviours, activities, and attributes that a given society considers appropriate for men and women. The policy and research interest is almost always in gender, not sex, but examination of data by sex is the means to making gender-based analyses.

Sex-disaggregated data are needed to show the differences that exist between women and men in a given society. Data must be disaggregated by

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1 These definitions have been taken from the World Health Organization’s website at http://www.who.int/gender/whatisgender/en/index.html
Box 1.1 Frequently used arguments against producing gender-sensitive statistics

<table>
<thead>
<tr>
<th>“We already have gender statistics - all our data are sex-disaggregated”</th>
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<tbody>
<tr>
<td>The production of gender-sensitive statistics does not involve only the production of sex-disaggregated data. Sex-disaggregated data form one important component of gender-sensitive statistics. But for full gender sensitivity, the National Statistical System (NSS) also needs to be confident that it produces statistics in respect of all the key gender issues in the country, and that it covers issues (such as maternal mortality or prostate disorders) that might affect only one sex.</td>
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<tr>
<td>“Women and men in this country already enjoy equality”</td>
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<tr>
<td>Women and men will never be exactly the same. Biological differences will persist, as will some social differences. Gender statistics are needed to illustrate both how women and men differ and how they are similar. It is only on the basis of this information that governments can make sensible policy and be sure that policies in respect of gender equity are succeeding.</td>
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<tr>
<td>“It is normal to have differences in the labour market between women and men because women prefer to stay at home”</td>
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<td>Gender-sensitive data do not present a value judgment on how the society should look. The task of the NSS is to produce data that accurately reflect the situation in the country. It is then up to the policy-makers and citizens more generally to decide whether the differences depicted between male and female are ‘normal’ or desirable.</td>
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<tr>
<td>“Adding breakdown by sex will cost too much”</td>
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<td>For the most part, there is a minimal cost attached to producing gender statistics with existing instruments. In some cases, it simply involves the addition of an extra question or column specifying sex. In other cases, it might involve the addition of several questions. At analysis time, the main cost would be the time involved in running extra tabulations, but in many cases, sex can simply be added to existing tabulations. Significant cost is generally only incurred when a completely new investigation (such as a survey) is carried out.</td>
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<tr>
<td>“Disaggregating data by sex will adversely affect the quality of the data”</td>
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<td>On the contrary, the integration of gender perspective will enrich the information available from the investigation and increase its explanatory value. The disaggregation by sex also often provides the basis for more thorough checking of the accuracy of data collection and recording as it allows for additional logical checks.</td>
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sex in order to analyze gender issues. However, this alone is not always sufficient for gender analysis. For example, the disaggregation of victims of homicide by sex has some value, but information on the perpetrator and their relationship to the victim is also needed to understand if the homicide was committed in a family context or by someone unknown to the victim.

The concept of gender places focus not only on women, but on both women and men. This is important because policies and programmes affect women and men differently and because men’s position in society is an important context for understanding women’s position and vice versa. However, a focus on either men or women may also be appropriate in some cases. For example, some issues pertain to women but not to men, such as maternal mortality, while there are some health issues that are specific to men such as testicular cancer.

1.3 Intersection of gender with other social groups

The dissection of the population into men and women is usually cross-cut by other social groups. The nature and implications of these intersections always need to be considered when producing gender statistics. Women and men are not homogenous groups. There are significant differences between women and between men depending on age, education, and other significant categories. It is important to be careful about generalizations about women or men that might be misleading because of this diversity. There are also important gender differences associated with ethnicity, religion, disability and sexual orientation, as well as with migration and citizenship status. Further distinctions may be based on urban/rural residence.

In some instances these intersections may simply lead to one form of disadvantage being added to another, while in other cases, there may be a multiplicative effect. Women in some population groups can face discriminatory behaviour due to differing gender roles in their own community. For example, as shown in a study carried out by the United Nations Development Programme (UNDP) in nine countries in South-East Europe in 2004, non-Roma persons are five times more likely to reach secondary education as Roma people. However, the percentage of Roma men who achieve secondary education is double the percentage of women. Among non-Roma people, the gender difference is less marked (UNDP 2006). Roma women are subject to a double disadvantage, both as women and as members of a minority group. It is therefore important,
wherever possible, to gather and present data disaggregated not only by sex but also by other social dimensions in order to assess the different situations.

1.4 Gender statistics topics

The areas covered by gender statistics are not confined to the family, or any one area, but span a wide range of concerns in every country. There are various ways to identify and classify critical gender concerns. The European Union’s roadmap for equality between women and men (European Commission, 2006a)\(^2\) and the United Nations Platform for Action (United Nations, 1995a)\(^3\) provided two such approaches.

The European Union’s roadmap outlined six priority areas for action on gender equality for the period 2006-2010:

- equal economic independence for women and men
- reconciliation of private and professional life
- equal representation in decision-making
- eradication of all forms of gender-based violence
- elimination of gender stereotypes
- promotion of gender equality outside the Union.

For each area, it identified priority objectives and actions, and presented indicators used by the European Commission to monitor progress towards gender equality in the policy areas identified in the Roadmap. It recognized that in some areas, statistics and indicators need to be further developed, such as concerning the gender dimension in health, or on crime and victims.

The 1995 United Nations Beijing Platform for Action identified 12 critical areas of concern calling for strategic actions. In turn, these gender concerns identified what statistics will need to be collected to provide a basis for policies and programmes and for their monitoring and evaluation. The listing below uses the phrasing of the “Platform” to establish why an area is a critical concern and presents selected research findings to describe briefly some gender issues each involves.

1. **Poverty**: ‘The persistent and increasing burden of poverty on women’. Poverty among women may be linked to policies on macroeconomics, welfare and credit that do not take sufficient account of the position of women. Poverty may be understood at the individual level of men and women as well as that of the household. Women may have different routes into poverty than men, such as widowhood and lone motherhood.

2. **Education and training**: ‘Inequalities and inadequacies in and unequal access to education and training’. In some countries, girls and women may have less access to education and training as compared with boys and men; there is often sex segregation so that women and men are typically found in different branches of education and training, which may lead to better or worse rewarded employment; life-long learning is typically more important to women than men, because women are more likely to want to return to education and employment in adulthood after periods of dedicated intensive childcare, but this may be changing as men lose jobs and need to qualify for new types of employment.

3. **Health**: ‘Inequalities and inadequacies in and unequal access to health care and related services’. In some countries, women may have less access to health care than men; some forms of health care concern women specifically, such as at the time of childbirth, or in their access to specific forms of reproductive health care; some diseases are specific to different sexes e.g. breast cancer, prostate cancer.

4. **Violence**: ‘Violence against women’. Gender-based violence is predominantly from men to women, including domestic violence, sexual violence, stalking, sexual harassment at work, female genital mutilation, trafficking of women into prostitution, forced marriage, and traditional and honour-based violence. Violence against women is both cause and consequence of gender inequality.

5. **Armed conflict**: ‘The effects of armed or other kinds of conflict on women, including those living under foreign occupation’. Women are typically less involved than men in decision-making about conflict resolution; women can be particularly vulnerable to sexual violence in conflict and post-conflict situations.

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\(^2\) http://ec.europa.eu/social/main.jsp?catId=422&langId=en

\(^3\) http://www.un.org/womenwatch/daw/beijing/platform/plat1.htm
6. **Economy**: ‘Inequality in economic structures and policies, in all forms of productive activities and in access to resources’: analysis of the economy often pays less attention to the forms of work in which women as compared to men are involved, for example, unpaid domestic work as compared with paid work; there are important distinctions between forms of work organisation that are of particular relevance to a gender analysis, such as the distinction between full-time and part-time employment; occupational and industrial segregation by sex, the intricacies of combining caring and employment, discriminatory practices, and the gender pay gap.

7. **Power and decision making**: ‘Inequality between men and women in the sharing of power and decision-making at all levels’: Gender issues include the proportion of women elected to Parliament, the proportion of women appointed as government ministers, the proportion of women in senior positions in the police, judiciary and other public bodies, the proportion of women on the boards of major companies, as well as the nature of the outcomes of political processes.

8. **Institutional mechanisms for the advancement of women**: ‘Insufficient mechanisms at all levels to promote the advancement of women’: This is a topic of specific relevance to gender relations; it concerns the existence, resources and capacity of the institutional machinery to advance women, including government ministries and programmes, and the development of an evidence base to evaluate policy, such as gender disaggregated statistics.

9. **Human rights of women**: ‘Lack of respect for and inadequate promotion and protection of the human rights of women’: While all human rights are women’s rights, some instruments have been developed that are focused on women, such as the United Nations Convention on the Elimination of Discrimination against Women (CEDAW). The concept of human rights has been particularly important in developing analysis of the policies needed to eliminate violence against women, which is conceptualised as a violation of women’s human rights.

10. **Media**: ‘Stereotyping of women and inequality in women’s access to and participation in all communication systems, especially in the media’: Gender issues in the analysis of the media include the extent of the participation of women in decision-making in the media, as well as the nature of the representations of women in the media, such as whether these are stereotypical rather than balanced.

11. **Environment**: ‘Gender inequalities in the management of natural resources and in the safeguarding of the environment’: Gender issues include the participation of women in decision making about the environment, as well as differential impacts and implications of environmental problems for women and men.

12. **The girl child**: ‘Persistent discrimination against and violation of the rights of the girl child’: Girls in some countries have less access to nutrition, health care and education than boys. They may be subject to paedophilia, forced prostitution, female genital mutilation, early marriage, female infanticide and prenatal sex selection.

Even this extensive list is not fully comprehensive. Others areas where gender analysis is important include transport, sport and leisure, reproduction, and sexuality.

### 1.5 Making gender visible in statistics

The process of identifying gender and gender relevance is a complex and often subtle one. It requires an understanding of where gender might be relevant and which areas might contain dimensions that are significantly gendered. This requires an understanding of current policy issues. It also requires technical understanding of the conceptual frameworks and methods used in official statistics. Certain important frameworks and methods traditionally used in official statistics are biased against women or men and thus women’s or men’s activities and preferences are not fully covered in statistics. In addition, the concept of the household, the basis for much policy-oriented data analysis, assumes homogeneity of all household members.

One example of bias in statistical concepts is in the definition of what the term ‘economic’ refers to. The traditional approach to the economy focuses on the monetized sector that can be represented in measures such as Gross Domestic Product. This omits unpaid household service work from the analysis. To understand the full
provision of goods and services in a country, it is important to have comprehensive data on all kinds of work. In order to investigate these issues more fully, Time Use Surveys are being undertaken increasingly by national statistical offices to collect data on all forms of work (see section 3.4). The 2008 System of National Accounts (UNSD 2009a)\(^4\) recognizes the need for separate measurement and recommends that valuation of production outside the boundaries set for the SNA be undertaken in satellite accounts.

In other areas, traditional concepts, such as family status, fertility preferences, contraceptive behaviour and actual fertility, are biased against men, in the sense that more information is collected on women in these areas. However, Sweden is one of several countries that collect and publish data on family status, contraceptive practices and fertility for both men and women.

A second type of problem occurs when the basic unit of analysis and presentation is the household, as for example in the traditional approach to poverty and social exclusion. This approach is often justified by the assumption that within the household there is an equitable pooling of resources. The assumption that the household is the appropriate unit is carried into certain public policies that tax and provide benefits to the household as a unit. However, use of the household as the unit in poverty analysis obscures gender inequalities in the distribution of resources within the household, and the implications of differential work incentives for women and men. It is important to collect data on income and resources at the level of individual men and women, as well as the level of the household unit, and to provide tabulations and analysis, which show both household and individual patterns.

Another way the household concept has made women invisible in statistics is the use of “head of household.” Often the characteristics of the entire household have been identified as those of the head, and the head has been assumed the oldest man in the household. This practice obscures a series of gender issues. For example, comparing ‘heads of households’ may well not be a comparison between male earners: the highest earning of a two-earner household may be the woman; the woman may be the main earner and the man the main carer; the household may be made up of a lesbian or homosexual couple. Using the concept of the ‘household reference person’ (see Box 3.2) allows the advantages of a single point of enquiry, without the disadvantages of making false gender assumptions.

The process of making gender visible in areas where it was previously thought not relevant lies at the heart of the development of gender statistics. Rather than making assumptions about the nature and significance of gender relations, such issues are opened up to analytic scrutiny. There are many questionable assumptions in traditional analysis. These include: assuming that gender is not relevant because other social and economic dynamics are more important; that women’s interests are always closely aligned with those of their husbands; and that a particular category of person is always male or female. The development of gender statistics creates the evidence base that enables such assumptions to be tested, and better analysis and policies can then be developed.

1.6 Gender equality

In many cases, the interest in examining the differences and similarities between women and men is aimed at understanding the nature and causes of gender inequality. Many contemporary policies are designed to reduce the level of gender inequality and statistics are needed to measure progress. However, the concept of gender equality is complex.

The definition of gender equality depends on the understanding of gender differences. Are all differences also inequalities? Or are some differences valued and not a sign of inequality? Does reaching gender equality mean changing the position of women, or does it mean a much deeper transformation that includes changing the lives of men as well? These different approaches to gender equality may be summarized in a three-fold typology. Gender analysis based on relevant statistics may indicate which approaches may be most appropriate to different areas of concern.

The interconnection between gender policies and wider social issues is recognized prominently in the United Nations Platform for Action (UN 1995a):

The advancement of women and the achievement of equality between women and men are a matter of human rights and a condition for social justice and should not be seen in isolation as a women’s issue. They are the only way to build a sustainable, just and developed society. Empowerment of women and equality between women and men are prerequisites for achieving political, social, economic, cultural and environmental security among all peoples.

First, equality means a single standard of evaluation, with the implication that unless there is sameness there is not equality. An example is that of equal pay for work of equal value. This approach is the most widespread and underpins most legal treatments of gender equality, which are based on the principle of equal treatment. It is the simplest and best understood meaning of the concept of gender equality. An example of an indicator used to measure this concept of gender equality is the gender pay gap (see section 4.1.3).

In a second approach, there is equal valuation of different contributions, with the implication that there is not a simple single standard against which men’s and women’s positions are assessed. An example is that of unpaid care work, and whether (and if so, how) this might be treated as equivalent to paid work. Time Use Surveys (see section 3.4) are invaluable in showing how much time women and men spend on paid and unpaid work. Should national accounts attempt to place a monetary value on unpaid care work in order to value it equally with paid work? This approach may lead to policies that involve special treatment for women, such as paid maternity leave. However, it is also argued that there is a danger that this approach may be used as a justification of the status quo rather than equality. Can different ever mean equal? Hence, while not an uncommon approach, this is a much disputed interpretation of the meaning of gender equality.

According to a third position, equality between men and women will only be achieved through the transformation of the practices and standards of both men and women. An example is that of changing the structural conditions so that gender equality may be achieved, such as reconciling work and family life by making the workplace compatible with care (again data from Time Use Surveys may provide useful insights); or by changing gender power relations in order to reduce violence against women (see section 4.12).

This approach requires major structural changes throughout society. It is similar to the first interpretation of the concept of equality, in that equality is achieved through ultimately achieving sameness, but differs in positioning this within a wider analysis of the transformation of the social environment. This is the approach most usually adopted within the strategy of gender mainstreaming, which seeks to include the gender equality perspective in all areas of analysis and policy.

There are vigorous debates on these three positions among gender scholars and policy makers. It is not necessary to make a decision as to which one is best in order to produce statistics relevant to gender equality. Indeed to the contrary; the job of a gender statistician is to produce the evidence in order to facilitate the discussions that might achieve the resolution of these debates by others.

There are several further nuances on the concept of gender equality, including equal opportunities and equity.

Equal opportunity is an approach which focuses on issues of access of individuals to particular institutions and treatments. It is close to the notion of equal treatment. With its focus on justice for individuals, however, it is an approach that rarely addresses the wider issues about the institutions that structure our resources. It may be regarded as necessary but perhaps not sufficient for the development of gender equality.

The concept of equity is closer to the notion of fairness than to equality, in that it allows some inequalities to be regarded as legitimate.

For example, there may be gender pay equity rather than pay equality if there are gender pay differences that might be caused by differences in skills rather than by discrimination. Also, often unequal treatment between women and men is considered necessary to obtain equitable results.