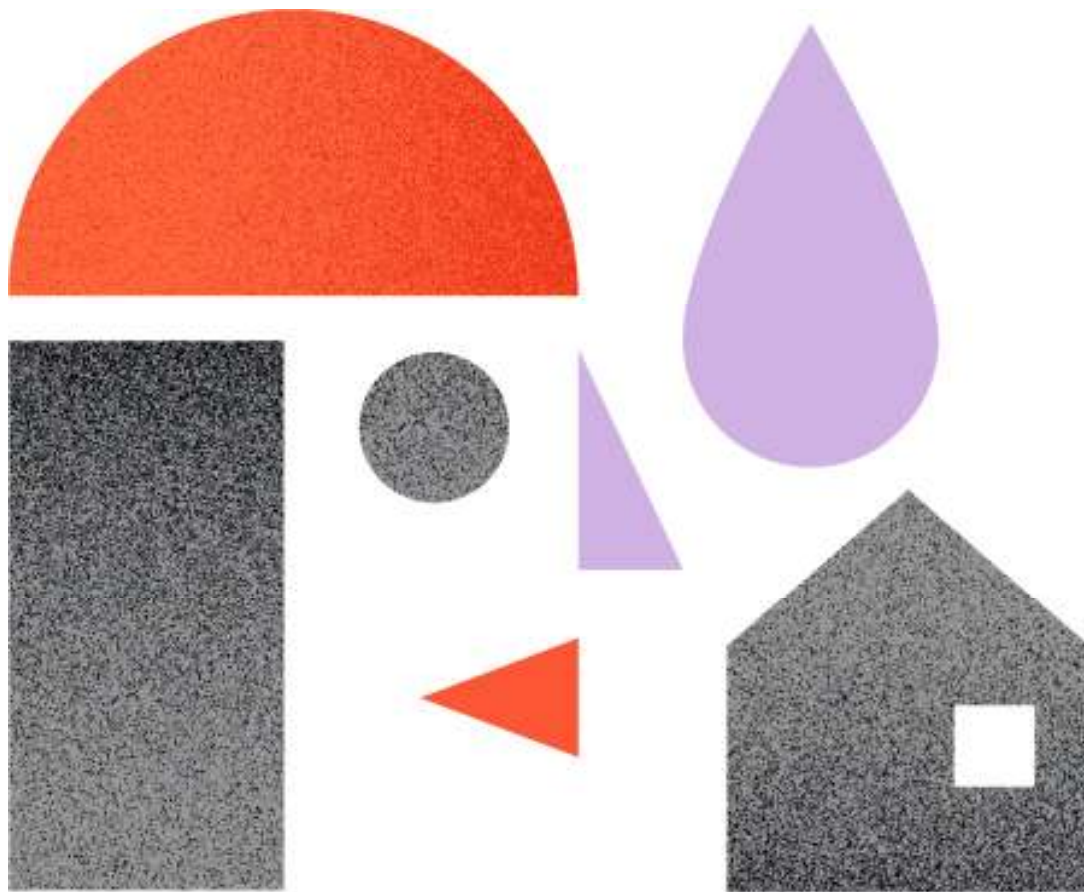


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Guidance note

Equality Insights and individual-level, gender-sensitive measurement of multidimensional poverty and inequality



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Terminology

From 1 August 2020, IWDA is taking forward earlier work known as the Individual Deprivation Measure (IDM) as a new, flagship program, ***Equality Insights***.

In this note, the Individual Deprivation Measure or IDM are used when referencing previous work or resources produced under the IDM program until 30 July 2020.

Acknowledgements

The IDM was a collaborative intellectual endeavour over some 12 years, to which many contributed. This Note benefits from work completed during a four-year program (2016-2020) to ready the IDM for global use, undertaken in partnership with the Australian National University and funded by the Australian Government, including the work of the ANU IDM team, Sharon Bessell, Janet Hunt, Helen Suich, Mandy Yap, Masud Hasan and Trang Pham. It also draws on work undertaken by IWDA with the Fiji Bureau of Statistics and funded by the Australian Government (2015-2017). The original research that developed the IDM (2009-2013) was a four-year, international, interdisciplinary research collaboration, led by the ANU, in partnership with IWDA and the Philippine Health and Social Science Association, University of Colorado at Boulder, and Oxfam Great Britain (Southern Africa), with additional support from Oxfam America and Oslo University. It was funded by the Australian Research Council and partner organisations.

1. Introduction

Equality Insights was launched by the International Women’s Development Agency in August 2020 as a flagship program to build on the legacy of the Individual Deprivation Measure.¹

Equality Insights is an individual-level gender-sensitive measure of multidimensional poverty, underpinned by twelve years of research and development, field testing and expert review and audit. It was developed to provide an alternative to household-level measurement, to strengthen and complement existing approaches to poverty measurement.

Equality Insights collects individual-level data about fifteen dimensions of life plus assets from all adults in a household. It can provide users with new insights into multidimensional deprivations experienced by populations of interest, beyond income and monetary wealth. It offers insights into material, social, economic, environmental, and political factors shaping poverty and inequality. Primary survey data collection from individual adults² makes possible analysis by gender, age (*Equality Insights* has no upper age cut off), disability (via the Washington Group Short Set questions), socio-cultural background, marital status, number of children, rural/urban, other characteristics as relevant, and intersections of these.

Sampling every adult in a household enables insights into any differences in deprivation inside households, including analysis of the ‘invisible poor’, to reveal the proportion of a population, and its demographic make-up, who live in better off households, but are individually deprived.³ Within-household data can also be used to estimate the degree of intrahousehold inequality in a population or sub-population, and the extent to which this inequality impacts men and women differently.

This Guidance Note introduces *Equality Insights*, its features and how it can be used to support gender-sensitive and inclusive vulnerability mapping, program development, delivery and monitoring.⁴

¹ *Equality Insights* takes forward IWDA’s work on the Individual Deprivation Measure (IDM). A history of the measure’s development can be found [here](#).

² Typically, *Equality Insights* defines adult as an individual 18+. In certain circumstances, we have used local circumstances to justify setting the threshold of ‘adult’ at 16. If altering the age threshold for the category ‘adult,’ careful attention should be paid to the ethics implications, particularly regarding child rights and child protection.

³ A publication on combining the IDM and wealth index to reveal individually deprived individuals in better off households is forthcoming.

⁴ From 2016-2020 the Australian National University (ANU) and IWDA undertook a significant program of refinement and testing to ready (what was then known as) the Individual Deprivation Measure (IDM) for global use. This work was supported by the Australian Government through the Department of Foreign Affairs and Trade. The World Food Programme (WFP) provided additional funding to IWDA for the final country pilot in the Solomon Islands, extending the work that was possible under this program. This provided WFP with an opportunity to assess the potential relevance of the measure for its work, including its regional Pacific interim multi-country strategic plan (2019-2022) and the emphasis on strengthening gender equality, disability inclusion and resilience.



2. Key concepts

Individual-level: A foundation for analysis and inclusion

The Sustainable Development Goals (SDGs) and the overarching commitment to 'leave no one behind' require and support an increased focus on disaggregated data. Various goals and targets are worded in ways that require disaggregated data, notably SDG 1 End poverty in all its forms everywhere and Target 10.2, which refers to 'the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status.' The United Nations Statistical Commission has called for a 'data revolution' as a central component of realising global commitments. '[I]nitiatives to develop new tools and frameworks to integrate new data sources, with the aim of fully harnessing the power of the data revolution and achieving the Goals and targets of the 2030 Agenda... are especially important in identifying those left furthest behind, since data are increasingly disaggregated by income, sex, age, race, ethnicity, migratory status, disability, geographic location and other characteristics. This type of detailed information is the basis upon which effective policies are shaped.'⁵

Limitations arising from data gaps are holding back progress on the SDGs. The ECOSOC President's summary of discussions at the High Level Political Forum in July 2019 noted:

9. (d) Inequality between and within countries remains a major obstacle to the achievement of the Goals. Further work is needed to gather relevant data that can illuminate the issues around inequalities and begin to identify and address its causes;

9. (e) Investment in data and capacity is also needed for the adequate measurement of indicators to inform policies, notably for ensuring that no one is left behind. If the most vulnerable are not visible in statistics, there will not be appropriate policy action.

12. The importance of improving the capacity of national statistical systems to generate data and measure progress towards the implementing the Goals was identified as a prominent issue, in particular the need to produce disaggregated data to identify exactly who is being left behind and to inform effective action.⁶

⁵ UN Statistical Commission (2018), *The Sustainable Development Goals Report 2018*, United Nations, Department of Economic and Social Affairs, p.16. <https://unstats.un.org/sdgs/files/report/2018/TheSustainableDevelopmentGoalsReport2018-EN.pdf>

⁶ <https://undocs.org/en/E/HLPF/2019/8>

Addressing gender data gaps arising from gender-blind measurement of poverty is a core part of this agenda. These gaps both reflect and perpetuate gender inequality.⁷ Better measurement of gender and poverty including disaggregated statistics was a priority in the Beijing Declaration and Platform for Action, the core output of the Fourth World Conference on Women in 1995.⁸ The 2020 UNECE *Poverty Measurement: Guide to Data Disaggregation* notes that ‘poverty remains one of the most problematic areas of gender statistics’.⁹ The lived realities of diverse women and men, and how they differ—or not—are masked by data only captured at the household or community level. Household-level measurement also limits the ability to accurately disaggregate by other relevant factors, including age and disability. Data that makes visible the experiences of men and women in their diversity is essential for inclusion and realising rights, and for policy efficiency and effectiveness.

Equality Insights responds to this challenge, collecting primary data to reveal the particular challenges faced by individuals and social groups, and providing direction on where action can make the most impact. The measure goes beyond enabling sex-disaggregated data, providing gender-sensitive data that is designed to draw out gender differences and illuminate the circumstances of men’s and women’s lives. *Equality Insights* also integrates the Washington Group Short Set of questions, to enable disaggregation by disability, and samples adults of any age, overcoming the limitations of key multi-topic surveys that focus only on women of reproductive age. This is a particularly egregious gap at this point in history given the current cohort of older women have experienced the cumulative impact of a lifetime of gender inequality and not benefited from more recent improvements.

Intra-household: A more complete picture of inequality¹⁰

Typically, information about household income and livelihoods is obtained through surveys that ask one person to provide information about their family or household. By collecting data this way, many assumptions are made about how resources are distributed across household members on the basis of information from one individual—despite evidence of significant inequality within households,¹¹ that factors such as gender, age, disability or ethnicity can influence access to and control of resources,¹² and United Nations guidance.¹³ Asking every adult in the household the same questions enables a move away from assumptions into empirical evidence about intrahousehold inequality, and who tends to be left behind, even within households. Original research conducted by the *Equality Insights* team¹⁴ found that individuals in the same household differ significantly across multiple economic, social, and environmental dimensions,¹⁵ and that measuring individuals within households uncovers previously invisible gender inequalities.¹⁶

⁷ For a detailed discussion of issues, see Chant, S. (Ed.), 2010. *International Handbook of Gender and Poverty: Concepts, Research, Policy*. Cheltenham: Edward Elgar.

⁸ The Beijing Declaration and Platform for Action emphasised the importance of investing in sex disaggregated data, to provide data about the circumstances of women. It called on national and international statistical organisations to ‘collect gender and age-disaggregated data on poverty’ and ‘examine the relationship of women’s unremunerated work to the incidence of and their vulnerability to poverty’ (para 68 (a) and (b)).

⁹ United Nations Economic Commission for Europe, 2020, *Poverty Measurement: Guide to Data Disaggregation, Conference of European Statisticians*, 68th plenary session, Geneva, 22-24 June
https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/2020/Long_version_of_9_Poverty_Measurement_Guide_to_Data_Disaggregation.pdf

¹⁰ There is a meaningful conceptual and practical difference between ‘every adult’ and ‘multiple adults’. Research commissioned under the IDM program illustrated limited redundancy by collecting information from all adults. Social Research Centre, 2020, *Individual Deprivation Measure Within Unit Sampling Options: Indonesia and South Africa*, Melbourne. Available on request.

¹¹ Kanbur, Ravi. 2016. *Intra-Household Inequality and Overall Inequality*. Cornell Dyson School Working Paper 20166-11.
<http://publications.dyson.cornell.edu/research/researchpdf/wp/2016/Cornell-Dyson-wp1611.pdf>

¹² Munoz Boudet, Ana Maria et al. 2018. *Gender differences in poverty and household composition through the life-cycle: a global perspective*. Policy Research Working Paper no. WPS 8360. Washington, D.C.: World Bank Group.
https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3135590

¹³ Department of Economic and Social Affairs Statistical Division, 2019, *Guidelines for Producing Statistics on Asset Ownership from a Gender Perspective*, Studies in methods, Series F No. 119, ST/ESA/STAT/SER.F/119, United Nations;
https://unstats.un.org/edge/publications/docs/Guidelines_final.pdf

¹⁴ This work was undertaken during a previous phase of work on the IDM.

¹⁵ McInerney, Carol and Fisk, Kylie, 2019a. *Measuring gender inequality within the household using the Individual Deprivation Measure in Fiji*, UNECE Conference of European Statisticians Work Session on Gender Statistics, Neuchatel, 15-17 May 2019.
https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/ge.30/2019/mtg1/WP24_Fisk_ENG.pdf

¹⁶ McInerney, Carol and Fisk, Kylie, 2019b. *Household-level measurement masks gender inequality across three dimensions of poverty*, UNECE Expert Meeting on Measuring Poverty and Inequality: SDGs 1 and 10, Geneva, 5 - 6 December 2019,
https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/ge.15/2019/mtg2/8_Intern_Women_DevAgency.pdf

Multidimensional: Poverty is more than lack of money

If you live in an informal settlement on the edge of an urban area, there may be no health centre, or the health centre may have few trained staff or low availability of prescription drugs. You may have left school early, which affects the kind of work you can do. The environment around you may be polluted, with risks for your health. There may be no electricity to your area, so you have to use unclean fuel for cooking and heating, which affects your health. If none of the decision-makers in your municipality listen to people like you, nothing improves. Many factors contribute to keeping people in poverty, and most cannot be resolved just by an individual having a bit more money in their pocket. Change requires understanding the multiple barriers that people face and how gender, age, disability, ethnicity, geography and more interact to deepen disadvantage. The *Equality Insights* surveys—the *Insights* survey and the longer *Equality Insights-Extended* version¹⁷—cover 15 dimensions of life: food, water, shelter, health, education, energy/fuel, sanitation, relationships, clothing, safety¹⁸, family planning, environment, voice, time-use and work, plus assets, providing insights into the relationship between financial deprivation and multidimensional deprivation.¹⁹ A bit more money can address some deprivations but not all. Dimension scores can be combined into an aggregate figure—the *Equality Insights Index*—a composite index that allows users to compare social groups and geographical populations on a single multidimensional scale.

Intersectional: No group is homogenous

Collecting data from individuals allows for multiple levels of disaggregation by respondent characteristics. Data can be explored by gender alone, as well as by gender and disability, gender and age, or gender and geography, and other characteristics. This ability is vital, as different challenges are faced by men and women in different political, social, and environmental contexts, at different life stages and with different levels of ability. From an analysis perspective, treating men and women as homogenous groups can mask inequalities within groups, and incorrect conclusions are likely to be drawn in the absence of analysis of intersecting inequalities. Consider education, a dimension in which older women tend to be severely deprived and young women much less deprived. If men's deprivation remains relatively consistent across age groups, comparing the average education of men and women of all age groups may lead to the conclusion that there is no gender difference in education. The inequality is revealed only when disaggregating by gender and by age together.

Scalar: seeing who is furthest behind

Equality Insights is a scalar measure. It measures degrees of poverty rather than using a binary classification of 'poor' or 'not poor'. Within each dimension, theme and indicator, *Equality Insights* uses a consistent four-point scale of deprivation from 1 (most deprived) to 4 (least deprived). Assessing deprivation on a (four-point) scale "overcomes the loss of important detail concerning the extent of deprivation, or vulnerability to falling into poverty, and perverse incentives associated with categorising people as either 'poor' or 'not poor'. Knowing how poor individuals are, and in what dimensions, matters for policy and programming and assessing the effectiveness of action."²⁰

¹⁷ See Section 3 below. The *Extended* survey asks additional questions that can provide useful contextual information to inform analysis.

¹⁸ Significant challenges were encountered in measuring freedom from violence as an aspect of multidimensional deprivation in the IDM. A number of revisions were made to the initial approach with the aim of improving data quality and gender sensitivity while managing risk. In 2019, the IDM team decided to abandon, not further revise, the initial approach, based on both methodological and risk considerations. *Equality Insights* has conceptualised a new Safety module as a replacement. The experience with measuring violence as part of a multidimensional measure of poverty is documented in a Learning Note, available on request.

¹⁹ *Equality Insights*, reflecting the approach taken when initially developing the IDM, recommends presenting financial status and multidimensional deprivation separately, as two axes of achievement, so that it is possible to see the relationship between the two, when these are more closely related and when they are not. This provides a basic way to 'evaluate whether a household is converting their financial status into deprivation reduction in the 15 dimensions we investigate. This also helps to highlight where deprivations exist that cannot be easily addressed primarily through financial transfers, such as violence, poor governance or voice.' However, 'a single composite figure including the financial scores and achievement scores can be calculated. This overall composite figure would then include information both about a person's financial situation and her achievements in a range of deprivations.' Wisor et al. 2014. *The Individual Deprivation Measure: A gender-sensitive approach to poverty measurement* (p.37).

²⁰ Hunt et al., 2017.

There are judgements that must be made in the creation of any ordinal scale. These are particularly difficult when measuring constructs as complex as dimensions of poverty. This is conceptually complex work, and we think there is still work to be done here, particularly in finding better equivalence between the same scores in different dimensions. Revisiting scoring will be an ongoing part of our work on *Equality Insights*.

3. Technical components of Equality Insights

The *Equality Insights* method is comprised of four technical components that together provide unique analytical possibilities and insights:

Equality Insights survey

Equality Insights involves primary data collection using a purpose-built survey designed to be gender-sensitive. Balancing efficiency and inclusion, different parts of the survey are administered at dwelling, household and individual levels. First, a brief set of questions administered to an individual identified as being knowledgeable about those living in the **dwelling**, to identify households and individuals in the dwelling. Second, a set of questions administered to an individual nominated as the most knowledgeable of each **household**, to complete a full household listing and assess dimensions shared by a household, such as shelter material or water source. Finally, an **individual** set of questions administered to every eligible adult member of the household.

Two versions of the *Equality Insights* survey are currently available. The **Insights** version is intended for routine administration and analysis, balancing comprehensiveness and parsimony.²¹ It comprises a total pool of 183 questions, noting that very few respondents answer every question given skip patterns.²² The *Equality Insights-Extended*²³ survey collects additional detail about each dimension, including contextual information to support analysis. It comprises a total pool of 301 questions, again noting that few respondents answer every question. Figures 1 and 2 provide a visual summary of differences. Average completion time varies with context. An additional survey variant will be developed in the first half of 2021, *Equality Insights-Rapid*, reflecting the challenges of face-to-face data collection in the COVID-19 context. It will provide a very short survey using the *Equality Insights* conceptual framework that responds to the challenges of face-to-face enumeration.²⁴

²¹ The original research to develop the Individual Deprivation Measure had a strong focus on achieving both comprehensiveness and parsimony. The process of review and refinement of the IDM survey in 2016-2020 increased survey length. Given *Equality Insights*' focus on access and use, the availability of data from five varied use contexts enabled a statistical review of survey performance, which informed the development of a shorter variant, reflecting the commitment to parsimony and respect for poor people's time that underpinned the initial research to develop the IDM.

²² Average survey administration time for the shorter variant is not yet available as it is yet to be used in the field. A nationally representative study in Solomon Islands in 2021 is in discussion.

²³ The current *Equality Insights-Extended* (previously the IDM Survey) was used in the Solomon Islands, the Republic of South Africa and Indonesia. Learning from a review of its performance in these three contexts informed development of the shorter *Insights* survey. Learnings will be integrated into the longer *Equality Insights-Extended* survey in 2021.

²⁴ See Section 7 for additional information.

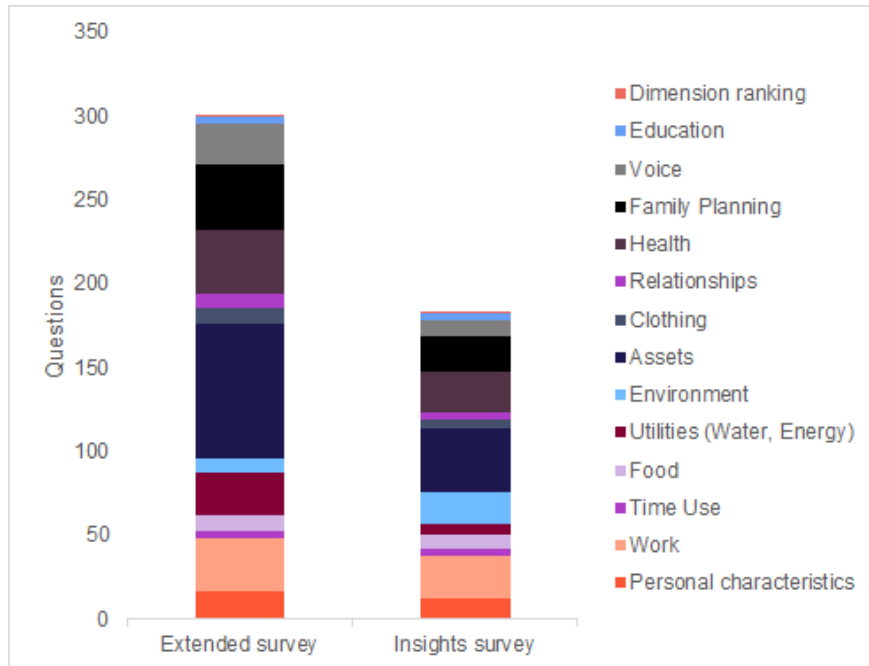


Figure 1: Individual survey length, *Extended* and *Insights* versions, by question categories and overall²⁵

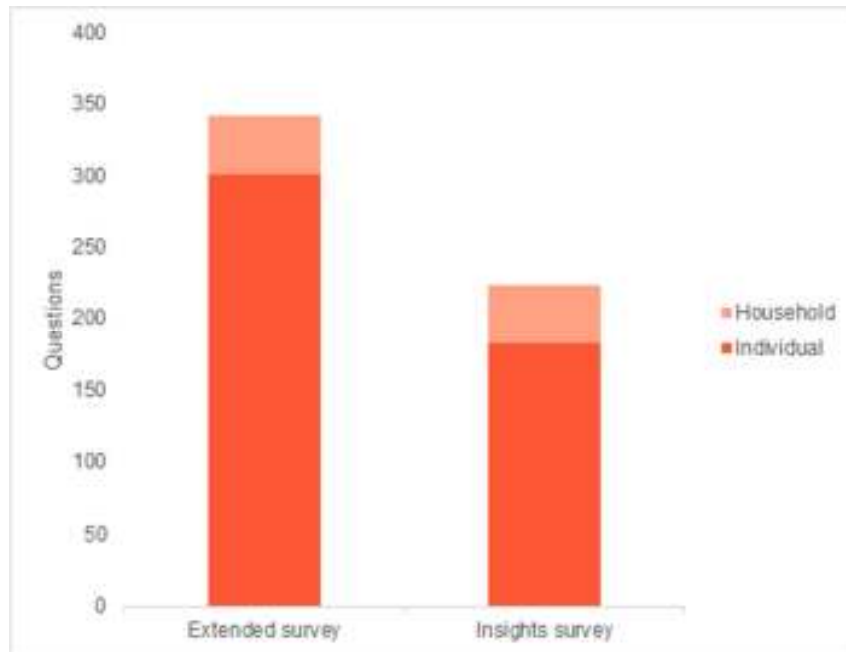


Figure 2: Overview of survey length, *Extended* and *Insights* versions

²⁵ *Equality Insights* assesses dimensions shared by a household, such as shelter material or water source, at the household level, so these are not shown here. Additionally, not all questions or survey categories are used for scoring purposes, so the categories in the key do not align with measure dimensions.

Equality Insights sampling method

Regardless of geographic coverage or level of representativeness, which is determined by the user with guidance from *Equality Insights*,²⁶ sampling for any *Equality Insights* study involves interviewing all adult members of a household,²⁷ who are available and consent to be interviewed within three call-backs to the household.

This intrahousehold sampling method is crucial to enable both ‘invisible poor’ and intrahousehold inequality analysis. Although this method creates a degree of clustering in the data, original evaluations²⁸ have found that collecting data from multiple household members does not produce redundant information, as household members are sufficiently different from each other;²⁹ and that it is cost-effective to collect data from multiple individuals in the same household, compared to simple random sampling of individuals.³⁰

Equality Insights scoring and aggregation method

Once multidimensional survey data is available for all household members, *Equality Insights* provides a unique, standardised method of scoring questionnaire responses from most to least deprived, and aggregating information from the survey items, to indicators, themes and dimensions, into a single index number at each level. This means that users have access to information and analysis on:

- **Items** (questions)—e.g., What primary water source does the household use for drinking?
- **Indicators**—e.g., Water Source—combined score aggregating water sources for drinking, cooking, and domestic work, ranked by levels of deprivation
- **Themes**—e.g., Water Quality—combined score including combined Water Source score, also including type of water treatment, and efficacy of the treatment.
- **Dimensions**—e.g., Water Dimension—combined score including Water Quality and Water Accessibility (itself a combined measure of distance travelled to collect water, and barriers to collecting water).

The scoring method for the IDM survey used in the Solomon Islands and South Africa is detailed in their scoring guides.³¹ Further work on scoring and aggregation is underway for the shorter *Insights* variant. This is conceptually complex work given the complexity of the construct being measured (multidimensional poverty). One area for further development is finding better equivalence between the same scores in different dimensions. A report documenting the process and outcome will be available in early 2021. Revisiting scoring will be an ongoing part of our work on *Equality Insights*.

Equality Insights Analysis

Once item, indicator, theme, dimension, and index scores are finalised, *Equality Insights* recommends analysis at each level of scores, and taking advantage of the unique features of the *Equality Insights* methodology, to produce multifaceted insights into the population/s of interest. This includes:

- **Insights analysis** by items, indicators, themes, dimensions, and geography;
- **Gender** and other relevant characteristics, including age and disability;³² and

²⁶ An excel-based tool is available to support budgeting. A sampling estimate function can assist in exploring sampling and budget parameters. For detailed budgeting, the sampling components of the tool should be completed by a person knowledgeable about sampling. Please contact IWDA for access.

²⁷ A different sampling approach may be required for the *Equality Insights-Rapid* variant being developed in the first half of 2021.

²⁸ Commissioned under the previous IDM program.

²⁹ Social Research Centre, 2020. *Individual Deprivation Measure Within Unit Sampling Options: Indonesia and South Africa*.

³⁰ Development Initiatives, 2020, *Assessing Costs of the Individual Deprivation Measure*.

³¹ Suich, Helen., Pham, Trang., Hunt, Janet., Hasan, Masud., Yap, Mandy., Bessell, Sharon., Bexley, Angie., Crawford, Joanne, Fisk, Kylie., McNerney, Carol, & Pradela, Joanna. 2020., [Individual Deprivation Measure: Index Construction and dimension scoring procedures. South Africa Country Study-Version 2](#). There were minor differences in the scoring used in Solomon Islands, reflecting the different context. This scoring guide will be available in the first quarter of 2021.

³² As relevant to context, information about a range of other individual characteristics can be sought and used for analysis purposes, including religion, ethnicity, caste, marital status.

- **Intersectional analysis**, highlighting any differences between social groups, on multiple intersections;
- **Thematic analysis**, in which multiple Equality Insights dimensions are brought together to produce analysis around a specific topic of interest;
- **In focus analysis**, in which specific analysis made possible by the unique features of the Equality Insights method are highlighted using the data;
- **Invisible poor analysis**, in which household wealth is calculated via an assets index and compared to the individual deprivations of household members.³³

Section 5 provides examples of questions that can be answered with each type of analysis.

4. Steps to implement an Equality Insights study³⁴

Steps ³⁵	Key considerations	Documentation
Country selection	<p>Ideally demand for gender data comes from governments and other data users. With a new(er) tool like <i>Equality Insights</i>, however, demand can require multi-stakeholder dialogue to build awareness and interest</p> <p>Map who collects gender data</p> <p>Map who uses gender data</p> <p>When were the last national or subnational poverty surveys (e.g. a Household Income and Expenditure Survey)?</p> <p>When was the last Demographic and Health Survey?</p> <p>Which policy frameworks call for more gender and poverty data?</p> <p>Where are the data collection and evidence gaps?</p>	Selection framework
Partnerships	<p>Establish funding partners—refer to existing institutional partnership guidance.</p> <p>Establish project partners—Women’s Ministries, National Statistics Offices, Women’s Rights Organisations, multilaterals, INGOs</p> <p>Establish implementation partners (if not with National Statistics Office)—previous experience and reputation, willingness to adhere to <i>Equality Insights</i> method, ideally locally owned and operated</p>	
Stakeholder engagement	<p>Involve government, NGOs, and private sector³⁶</p> <p>Provide tailored briefings for potential stakeholders</p> <p>Establish steering committee; role includes buy in, technical advice, pathways to use</p>	<p>Agendas</p> <p>Meeting notes</p> <p>Steering Committee TORs</p>
Budgeting	<p>Use <i>Equality Insights</i> budget building tool to estimate sample and build budget³⁷</p> <p>Include project management costs</p> <p>Include costs associated with supporting data into use –in the Generic Statistical Business Process Model (GSBPM) this includes activities related to the Analyse, Disseminate and Evaluate categories.</p>	Excel-based costing tool

³³ A publication on combining the IDM and wealth index to reveal deprived individuals in not deprived households is forthcoming.

³⁴ This table is intended to provide a high-level overview of key steps involved in undertaking an *Equality Insights* survey, and associated documentation and resources, using administration in the Solomon Islands as a guide.

³⁵ Note that the order of these steps may vary with context and will often be undertaken in parallel.

³⁶ RDI Network (2020), *Enhancing Research Impact in International Development: A Practical Guide*. Authored by Nichole Georgeou and Charles Hawksley. https://rdinetwork.org.au/wp-content/uploads/2020/02/ERIID_V8_DIGITAL.pdf; Open Data Watch, *Data Value Chain: Moving from production to impact*. <https://opendatawatch.com/publications/the-data-value-chain-moving-from-production-to-impact/>

³⁷ The budgeting tool is organised around the stages of the Generic Statistical Business Process Model (GSBPM), and focuses on costs associated with data collection, given the variability of other kinds of costs across organisations and contexts.

Contracting	<p>Review procurement requirements and determine strategy for identifying data collection firm</p> <p>Identify and include trigger points for changing course</p> <p>Establish program management / oversight group in contract to make decisions on adjustments during implementation, problem solving etc</p>	
Approvals	<p>Review organisational ethics requirements</p> <p>Check national ethics requirements</p> <p>Check other local research requirements (e.g., advising local level administration)³⁸</p> <p>Identify partner ministry internal mechanisms</p> <p>Identify local languages and translate all survey materials including consent documentation</p>	<p>Research Protocol</p> <p>Relevant legislation</p>
Training	<p>The <i>Equality Insights</i> survey involves interviewing all adults in a sampled household. Teams of equal numbers of male and female enumerators are required so men interview men and women interview women³⁹</p> <p><i>Equality Insights</i> provides standard enumerator training materials</p> <p>Provide general training in research methods and ethics, specialist gender and disability inclusion training, and specific training on the Equality Insights survey</p> <p>Integrate practice throughout the training</p> <p>Create a safe space for enumerators to ask questions. Provide opportunity for anonymous questions and feedback</p>	<p>Training manual</p> <p>Training slides</p>
Pilot	<p>Create conditions of fieldwork as realistically as possible</p> <p>Allow sufficient time for analysis of data and debriefing with enumerators</p> <p>Allow sufficient time in schedule to adjust questions, tablet coding, translations</p>	
Fieldwork	<p>Establish line reporting, safety and monitoring mechanisms</p> <p>Adapt and make adjustments, as required, using previously established oversight mechanisms</p>	<p>Training manual</p> <p>Fieldwork reports</p>
Enumerator feedback	<p>Allow multiple days to discuss fieldwork with enumerators</p> <p>Insights from the field are crucial and can improve analysis and validation of findings</p>	<p>Feedback notes</p>
Data storage	<p>Minimum requirements:</p> <p>Remove identifying information and store separately from data</p> <p>Password protect on secure servers</p> <p>Ensure protocols in place governing access to identifiable and de-identifiable data</p> <p>Ensure understanding of and compliance with relevant privacy legislation governing storage and access of data</p>	<p>Standard data</p>

³⁸ Where the survey becomes part of routine national data collection this step will become an internal-to-government coordination process, subject to standard approval processes. For multilateral organisations, the process of securing appropriate local permissions will likely be standardised and documented.

³⁹ Note: in contexts where survey enumeration is typically undertaken by women (this was our experience when implementing the initial IDM proof of concept trial in the Philippines in 2013, for example), this requirement may need to be varied.

5. What kinds of questions can be answered through Equality Insights analysis?

Type of Analysis	Example questions addressed by analysis	Relevant documents
Item, indicator, and dimension analysis	<p>How many people use unclean water sources?</p> <p>What percent of the sample are most deprived in voice in the household?</p> <p>What is the overall distribution of scores for the relationships dimension?</p>	<p>Solomon Islands Snapshot Report</p> <p>Exploring Multidimensional Poverty in Fiji</p>
Gender	<p>What percent of women have sufficient menstrual sanitation products?</p> <p>What is the gender breakdown of those most deprived in voice?</p>	<p>Solomon Islands Snapshot Report</p>
Intersectional	<p>Are women of reproductive age more deprived in water than women in other age groups?</p> <p>Are older women more deprived in education than older men?</p> <p>What is the effect of disability on men's health care access?</p>	
Thematic analysis	<p>What are the barriers to women's economic empowerment? (e.g., analysis of voice, work, time use dimensions together)</p> <p>How does gender impact food security and resilience? (e.g., gender analysis of food, voice, health dimensions together)</p> <p>What are the gendered risks of Covid-19? (e.g., analysis of health, sanitation, and assets)</p>	<p>Food security, gender and resilience in the Solomon Islands</p> <p>Women's economic empowerment in the Solomon Islands</p> <p>Gender and Health: COVID-19 preparedness in the Solomon Islands</p>
In-focus analysis	<p>How does deprivation in water vary within households?</p> <p>How do profiles of deprivation vary across household members?</p> <p>In which dimensions is within-household deprivation greatest?</p> <p>Who experiences joint deprivations? (e.g., who are the people experiencing deprivation in water, energy, and health?)</p> <p>To what extent do respondent dimension priorities reflect objective deprivation levels (as measured by <i>Equality Insights</i>)?</p>	<p>Solomon Islands Snapshot Report</p> <p>Counted and Visible conference presentation</p>
Invisible poor analysis⁴⁰	<p>What percent of those who live in wealthy households but are poor themselves are women?</p> <p>Which dimensions reveal the 'invisible poor'?</p> <p>Where are the largest gaps between asset wealth and multidimensional wealth? Who experiences this gap?</p>	<p>Wealth index paper (forthcoming)</p> <p>McInerney & Fisk, 2019a</p> <p>McInerney & Fisk, 2019b</p>

⁴⁰ This analysis involves creating a wealth index from assets data, then estimating *Equality Insights*-deprived individuals within each wealth quintile, to reveal deprived individuals in not deprived households. A publication on the results for Fiji and Solomon Islands data is planned.

Analysis challenges: Example questions to consider

- Check for systemic bias in missing data, e.g., are more older women missing from the education dimension than older men?
- What proportion of responses are 'Other' responses? This suggests new survey categories may be required.
- Check context relevance: does 'deprivation' as defined by standard *Equality Insights* scoring reflect context-specific deprivation? E.g., Do people in Fiji need heating?
- Have you followed the standard procedure for constructing *Equality Insights* dimensions and indices?⁴¹ Consult the OECD Handbook on constructing composite indicators for additional information.⁴²

6. Monitoring uptake and use of findings and data

Tracking how findings and data from an *Equality Insights* study are being used is important to validate the demand for and use of quality gender data and poverty measurement. The following questions are examples of the types of questions users should ask and report following implementation of an *Equality Insights* study. The following list is not exhaustive, and indicators will be different in different contexts. *Equality Insights* encourages users to share the results of their monitoring with us, so we can continue to learn and understand how *Equality Insights* is being used to deepen understanding and evidence that supports vision for change.

Output indicators

- Have the data or findings from briefs and reports been referenced in papers, briefs, seminars, roundtables, etc?
- Have the data or findings from briefs and reports been included in a submission to a parliamentary inquiry?
- Have the report findings been disseminated within the organisation/agency/department/team?
- Have the findings been disseminated on social media?
- Have other stakeholders requested access to the data?

Outcome indicators

- Have the data or findings from briefs and reports been used to enhance the gender sensitivity or intersectionality of a policy proposal?
- Have the data or findings from briefs and reports been used as a baseline/midline/endline for a program or intervention?
- Have the data or findings from briefs and reports been used /reported where IDM/Equality Insights is an indicator (e.g., the Pacific Roadmap)?
- Have others referenced the study to apply for funds?
- Have the findings been used to design a program?
- Have the initial findings been used as the basis of commissioning further research?
- Are findings incorporated into a country/context/organisational gender assessment?
- Are findings incorporated into regular publications or databases so as to reach a wider audience?

The focus of wider evaluative questions will depend on purpose and context. Examples might include:

⁴¹ A technical report on scoring and aggregation for the Solomon Islands is available at <https://equalityinsights.org/resources/solomon-islands-study/>

⁴² OECD, 2008. Handbook on Constructing Composite Indicators, Paris, OECD, <https://www.oecd.org/sdd/42495745.pdf> (accessed 16 February 2021)

- To what extent and how does the measure provide actors at community, state and system level with data to support gender responsive action consistent with their roles?
- To what extent is *Equality Insights* (the measurement approach and data) informing policy and program design and supporting evaluation?
- To what extent has *Equality Insights* (measurement approach and data) provided advocates with evidence to act on gendered barriers and deprivations?

7. Directions

Equality Insights is building on the foundations of the Individual Deprivation Measure with a focus on increasing the accessibility of individual-level, gender-sensitive poverty measurement and data, including for actors with fewer resources or more limited technical capacity. We want decision-makers and change advocates of all kinds to be able to understand more about poverty in their context and to inspire change in support of inclusive and impactful poverty alleviation.

Equality Insights shorter variant

As noted earlier (Section 3), the *Equality Insights* team has developed a shorter survey variant, with financial support from WFP. Following completion of the IDM Program in July 2020, the *Equality Insights* team undertook a statistical review of the performance of IDM survey questions across five countries.⁴³ This review, and assessment against conceptual priorities, informed a reduction of the total question pool by 40 percent compared to the IDM survey used in the Solomon Islands. The shorter *Insights* version is expected to be the primary survey going forward, balancing comprehensiveness and parsimony. Work on the survey instruments was completed in November 2020. Work on scoring and aggregation for the shorter variant is continuing. This is conceptually complex work given the complexity of the construct being measured (multidimensional poverty). One area for further development is finding better equivalence between the same scores in different dimensions. A report documenting the process and outcome will be available in the first half of 2021. Revisiting scoring will be an ongoing part of our work on *Equality Insights*.

Equality Insights-Rapid

COVID-19 has devastated livelihoods and pushed millions into poverty. It is vital that the circumstances of groups that were experiencing inequality and poverty prior to the pandemic and have been hit hardest by it—including women and girls, people with disabilities and those living in poverty—are visible in data. Effectiveness, equity, rights, resilience and social stability all require information about how policies, programs and resources are translating into tangible benefits for those most impacted. Efforts will be constrained as long as routine poverty data is collected about households in ways that treat a single household member as a proxy for everyone else, obscuring the circumstances of individuals.

Improving the availability of individual-level, gender-sensitive data about multidimensional poverty and inequality is vital to providing evidence to guide targeted action and improve lives. Modifying the existing *Equality Insights* survey will allow us to move faster in the COVID-19 environment. In the first half of 2021, supported by the Australian Government, we will develop a survey variant—*Equality Insights-Rapid*—with the intention that this survey can be administered without face-to-face data collection. This will address logistics, health, safety and cost factors associated with primary data collection in times of pandemic, while generating individual-level, gender-sensitive data that enables demographic and social group analysis. This survey variant is intended to have wider and ongoing utility as a tool for more rapidly capturing information about individual-level, gender-sensitive, multidimensional poverty. A Global Technical Advisory Group will support decision-making on modality and sampling.

Inadequate measurement has real world impacts. Prominent academics suggest that around one third of global inequality lies within the household rather than between households,⁴⁴ meaning poverty and

⁴³ Fiji, Nepal, Indonesia, South Africa and Solomon Islands. Not all questions were used in all five surveys. However, surveys were substantially the same in Fiji and Nepal, and in Indonesia, South Africa and Solomon Islands, and a significant proportion of questions were substantially the same across five use contexts.

⁴⁴ Kanbur, Ravi. 2016. *Intra-Household Inequality and Overall Inequality*. Cornell Dyson School Working Paper 20166-11 <http://publications.dyson.cornell.edu/research/researchpdf/wp/2016/Cornell-Dyson-wp1611.pdf>

inequality are routinely underestimated by around one-third. This underestimation of inequality also leads to over-estimation of the relationship between economic growth and improvements in human welfare.⁴⁵ Current approaches also focus significantly on monetary poverty, when a wider range of economic and social barriers perpetuate poverty and inequality.⁴⁶ This is a particular limitation in contexts where the formal economy is relatively small and subsistence production significant.

Relying on inadequate data to inform COVID-19 response and recovery efforts, then, brings real risks. Economic recovery risks include:

- Uneven distribution of the benefit of response activities
- Interventions that reproduce or potentially exacerbate existing security, economic and social risks faced by particular groups
- Over-reliance on economic data that provides information about inputs to recovery, or partial information about the formal economy (e.g. via GDP) without corresponding attention to outcomes data about how recovery is translating into improved circumstances in practice

Social cohesion and stability risks include:

- Action that is misaligned with need risks exacerbating social/political discontent.

Individual-level, gender-sensitive data about multidimensional poverty and inequality provides data that is a foundation for inclusion and effectiveness, and for realising the potential to build back better.

⁴⁵ Kanbur, Ravi. 2017, Keynote, World Bank Individual Poverty Measurement Workshop, 2 February 2017, Washington; UNDP 2019. *Beyond income, beyond averages, beyond today: Inequalities in human development in the 21st century*. New York, New York <http://hdr.undp.org/sites/default/files/hdr2019.pdf>. See also: World Bank. 2018. *Poverty and Shared Prosperity 2018: Piecing Together the Poverty Puzzle*, Washington, DC: World Bank. <https://www.worldbank.org/en/publication/poverty-and-shared-prosperity>

⁴⁶ The multidimensional nature of poverty is now widely recognised, and multidimensional measurement incorporated in the Sustainable Development Goals. For a concise summary of impetus and history, see Alkire, S. 2020. 'Multidimensional Poverty Measures as Policy Tools', pp. 200-201, in V.Beck et al (eds.) *Dimensions of Poverty: Measurement, Epistemic Injustices, Activism*. Philosophy and Poverty 2. Springer International Publishing.

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Annex 1: Measure features and strengths

Features	Strengths/what this enables
Measurement approach and survey	
Individual-level measurement	Provides a foundation for disaggregation, analysing which groups are deprived, and how barriers overlap to deepen marginalisation.
Inclusive data	<p>Primary data collection means <i>Equality Insights</i> is not limited to use of existing data.</p> <p><i>Equality Insights</i> enables disaggregation by sex, age (all adults), disability (via the Washington Group short set), socio-cultural background, marital status, number of children, rural/urban, other characteristics as relevant, to show how demographic characteristics influence circumstances.</p>
Assesses multidimensional deprivation (15 economic, social, environmental dimensions) and financial deprivation (assets)	<p>Enables assessment of the relationship between multidimensional deprivation and financial deprivation.</p> <p>Recognises the composite nature of vulnerability and the inter-relationships between sources of disadvantage and marginalisation.</p>
Gender-sensitive	Includes dimensions fundamental to women’s rights and gender equality, and indicators across dimensions that are gender sensitive, enabling measurement of gendered experiences of multidimensional poverty
Extensive information from a single individual	Produces a large data set that can be explored at any level of analysis—individual, household, community, social group, national—to inform nuanced analysis and targeted policy action.
Intersectional analysis	Can be undertaken at any level of analysis – for example, <i>sex by disability</i> in an urban area. Vulnerability is exacerbated by overlapping barriers and discrimination associated with particular social characteristics, and it varies over the life course and by location. Drawing meaningful and statistically significant conclusions at multiple layers of disaggregation is conditional on sample size.
Multi-level analysis	Combining intersectional and multidimensional analysis enables analysis of who experiences multiple deprivations, how deprivations in different dimensions of life may interact to create and deepen vulnerabilities, and how patterns of vulnerability vary by social group. ⁴⁷
Data collection method	
Interviews every adult in a sampled household	<p>Enables within-household analysis, where an estimated third of global inequality lies, to provide a more complete and accurate picture of poverty and inequality.</p> <p>Using household-level data systematically suppresses inequality (by ignoring within-household disparity) and leads to inaccurate</p>

⁴⁷ The importance of individual-level, gender-sensitive, multidimensional measurement for understanding intersectional inequality and the distribution of joint deprivations was a focus of the IDM presentation to the [Counted and Visible: Global Conference](#) on gender and intersectional inequality on 26-27 February 2020. The IDM presentation is available [here](#). The insights that are possible from analysing who experiences multiple deprivations are explored briefly in the [Solomon Islands Snapshot Report](#), pp.76-78.

	<p>assumptions about the relationship between economic activity and human welfare outcomes.⁴⁸</p> <p>Reveals the within-household inequality hidden by household-level measurement, including previously invisible gender inequalities.^{49,50}</p> <p>Confirms that individuals in the same household differ significantly across multiple economic, social, and environmental dimensions.⁵¹</p> <p>Enables more informed assessment of likely impacts of policy and programming actions on individuals.</p> <p>Is cost-effective compared to simple random sampling of individuals.⁵²</p>
Measure construction	
Scalar/measures on a four-point scale	<p>Reveals depth of deprivation, who is furthest behind, in which areas, to support priority setting, targeting and measuring impact.</p> <p>Moves beyond a binary of <i>poor</i> or <i>not-poor</i>.</p>
A standardised system of indicator coding, dimension scoring, and composite index construction	<p>Enables comparative analysis.</p> <p>Dimension scores can be aggregated into an overall score out of 100 for comparative purposes, and decomposed to see what is driving deprivation (in particular areas, for particular groups).</p> <p>Dimension scores can be presented as a dashboard so outcomes in each dimension are visible.</p> <p>Weighting can be varied to reflect priorities in particular contexts.</p>
Reviewed by global experts	<p>The Competence Centre on Composite Indices and Scoreboards (COIN)— part of the European Commission’s Joint Research Centre— audited the IDM Fiji methodology⁵³, considering statistical coherence, appropriateness of the approaches to scoring and aggregating.</p> <p>Recommendations informed the final approach. COIN assessed the survey and method as robust and appropriate.</p>

⁴⁸ Ravi Kanbur estimates that around 1/3 of global inequality sits within households rather than between households and so is hidden by household-level measurement. 'Our standard money metric measures of inequality and poverty suppress, by design, intra-household inequality.' This also means that assessments of how growth translates into improved outcomes for individuals are inaccurate. Kanbur, Ravi. 2016. *Intra-Household Inequality and Overall Inequality*. Cornell Dyson School Working Paper 20166-11. <http://publications.dyson.cornell.edu/research/researchpdf/wp/2016/Cornell-Dyson-wp1611.pdf>

⁴⁹ McInerney, Carol and Fisk, Kylie. 2019b. *Household-level measurement masks gender inequality across three dimensions of poverty*, UNECE Expert Meeting on Measuring Poverty and Inequality: SDGs 1 and 10, Geneva, 5 - 6 December 2019, https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/ge.15/2019/mtg2/8_Intern_Women_DevAgency.pdf

⁵⁰ <https://equalityinsights.org/wp-content/uploads/2020/07/Gender-insights-in-the-Solomon-Islands-Equality-Insights.pdf> pp. 79-81

⁵¹ McInerney, Carol and Fisk, Kylie. 2019a. *Measuring gender inequality within the household using the Individual Deprivation Measure in Fiji*, UNECE Conference of European Statisticians Work Session on Gender Statistics, Neuchatel, 15-17 May 2019; https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/ge.30/2019/mtg1/WP24_Fisk_ENG.pdf. Independent evaluations of the IDM completed in 2020 confirmed that collecting data from multiple household members does not produce redundant information, as household members are sufficiently different from each other (Social Research Centre, 2020); and that it is cost-effective to collect data from multiple individuals in the same household, compared to simple random sampling of individuals (Development Initiatives, 2020).

⁵² Development Initiatives, 2020

⁵³ Caperna, G.; Papadimitriou, E. 2020, JRC Statistical Audit of the Individual Deprivation Measure, EUR 30320 EN, Publications Office of the European Union, Luxembourg; https://ec.europa.eu/knowledge4policy/publication/jrc-statistical-audit-individual-deprivation-measure_en

Annex 2: Dimensions, themes and indicators, Individual Deprivation Measure, Solomon Islands 2020

Dimension	Theme	Indicator
01 Food	Food Insecurity	Food insecurity
02 Water	Drinking water	Drinking water source, reliability and treatment
	Domestic water	Domestic water source and reliability
	Water collection threats	Water collection threats
03 Shelter	Habitability	Flooring material
		Roofing material
		Exterior wall material
		Housing condition
		Crowdedness
	Ownership of essential household items	Ownership of essential household items
Security of tenure		Eviction concern
		Recognition of ownership
		Mortgage/rent stress
04 Health	Health status	Physical health status
		Psycho-social health status
	Health care access and quality	General health care access and quality
		Pre-natal health care access and quality
05 Education	Education level	Educational completion
	Functional literacy and numeracy	Functional literacy
		Functional numeracy
06 Energy	Cooking energy	Cooking energy source and reliability
	Lighting energy	Lighting energy source and reliability
	Heating energy	Heating energy source and reliability
	Energy collection threats	Energy collection threats
07 Sanitation	Toilet facilities	Toilet type
		Toilet ownership
	Washing facilities	Handwashing facilities
		Access to toiletries
	Private changing place (during menstruation)	Private changing place (during menstruation)
08 Relationships	Dependence and support	Dependence and support
	Participation in community events	Community event participation
		Participation during menstruation
09 Clothing	Basic clothing and footwear	Basic clothing and footwear ownership
		Basic acceptability and protection
	Other clothing and footwear	School or work clothing
		Formal clothing
	Sanitary product use	Sanitary product use

Dimension	Theme	Indicator
11 ⁵⁴ Family planning	Unmet need for contraception	Unmet need for contraception
12 Environment	Exposure to environmental problems	Exposure to environmental problems
	Natural resource utilisation	Wild resource utilisation Biomass fuel utilisation
	Safe environment	Safe environment
13 Voice	Voice in the public domain	Voting
		Participation in local decision making
		Perception of raising concerns
	Personal control over decision making	Personal control over decision making
14 Time use	Time burden	Time burden and on-call time
15 Work	Work for pay, profit and production	Employment status
		Job security
		Hazards in work for pay, profit and production
		Autonomy and harassment in work for pay, profit and production
	Unpaid domestic and care work	Hazards in unpaid domestic and care work
		Respect in unpaid domestic and care work
Double labour burden	Double labour burden	

⁵⁴ The module on violence was not enumerated in Solomon Islands. An alternative Safety module has been conceptualised. A Learning Note documenting the rationale for and challenges of measuring violence as part of a multidimensional measure of poverty will be available in the first quarter of 2021.

About IWDA

IWDA is an Australian-based organisation, resourcing diverse women's rights organisations primarily in Asia and the Pacific, and contributing to global feminist movements to advance our vision of gender equality for all. We exist to defend and advance the rights of diverse women and girls. IWDA was established in 1985, through the initiative and insight of three outstanding women: Ruth Pfanner, Wendy Poussard and Wendy Rose, with the aim to progress the rights of women.

IWDA's roots are in the development sector, as Australia's only development organisation entirely focused on gender equality. This brings strengths in the form of deep, long-lasting relationships with the network of women's rights organisations we support. And increasingly, our future lies as part of the global feminist movement.

IWDA's approach represents a third way between the models of women's funds and international development NGOs: we resource the work of diverse women's rights organisations, enable them to be more effective by providing support that goes beyond money, and we make our own contributions to feminist movements through advocacy, knowledge creation and translation.

IWDA and Equality Insights

Research and evidence creation that supports systemic change has been part of IWDA's work since its inception, and a growing focus over the last two decades. So has partnership and collaboration.

IWDA invested in the development of the IDM in 2008, recognising data's systemic change potential, and its importance for visibility and action on gendered inequality and poverty. This remains the organisation's largest ever commitment of community raised funds to a single initiative, as the industry partner in an international research collaboration supported by an Australian Research Council Linkage Grant to help transform gender-blind poverty measurement. In 2015 IWDA partnered with the Fiji Bureau of Statistics, with funding through Pacific Women Shaping Pacific Development, to lead the first Individual Deprivation Measure study following the initial post-proof of concept trial in the Philippines in 2013. In 2016 IWDA partnered with the Australian National University to jointly deliver a four-year program of refinement and development to ready the tool for global use.

IWDA is now taking forward this world-first measure as a flagship program, *Equality Insights*. We are committed to shifting standards about what counts as adequate data, and moving the measure into regular use. This process is underway, starting with integration of the Individual Deprivation Measure/*Equality Insights* in the *Pacific Roadmap on Gender Statistics*⁵⁵ as a specialised survey that addresses data gaps and an indicator of the availability, quality, and relevance of a country's gender data.

IWDA is championing *Equality Insights* within the Generation Equality processes, as a member of the Action Coalition on Women's Movements and Leadership. Individual-level, gender-sensitive poverty measurement is essential to realise the commitments to improve data about gender and poverty made by governments in the Beijing Declaration and Platform for Action.⁵⁶

IWDA is also focused on making the measure and associated survey variants usable by a broad array of actors, either with IWDA's technical support or independently, where sufficient capacity exists.

⁵⁵ UN Women and Pacific Community, 2020, *Pacific Roadmap on Gender Statistics*,

<https://data.unwomen.org/sites/default/files/documents/Publications/Pacific-Roadmap-Gender-Statistics.pdf>

⁵⁶ In 1995, at the Fourth World Conference on Women, the Beijing Declaration and Platform for Action emphasised the importance of investing in sex disaggregated data, to provide data about the circumstances of women. It called on national and international statistical organisations to 'collect gender and age-disaggregated data on poverty' and 'examine the relationship of women's unremunerated work to the incidence of and their vulnerability to poverty' (para 68 (a) and (b)).