

**GENDER AND POVERTY: AN ANALYSIS OF GENDER-POVERTY LINKAGES IN THE
EASTERN CAPE PROVINCE OF SOUTH AFRICA**

By

ISAAC EKAR

Dissertation submitted as partial fulfilment for the degree of Masters of Development Studies in the faculty of Humanities, Development Studies, and Social Sciences at the University of KwaZulu-Natal, Durban, South Africa.

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DECLARATION OF ORIGINALITY

This dissertation is an original work by the author and has not been submitted in any other form to another university. Where use has been made of the work of others it has duly been acknowledged and referenced in the text.

The research was undertaken in the School of Development Studies at the University of KwaZulu-Natal, Durban, and under the supervision of Professor Julian May during the period June 2004 to January 2005.

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Finally and very importantly, this research could not have been undertaken without the funding granted by the Mellon Foundation, facilitated by Professor May and Dr. Zanele Mfono of the University of Fort Hare; my special gratitude to them both.

Note: This research is a collaborative work, the findings of which are to feed as inputs into a major study on poverty dynamics in the Eastern Cape Province of South Africa, a project being financed by the Mellon Foundation and being coordinated by Dr. Zanele Mfono.

ABSTRACT

In the South African context, the Eastern Cape Province constitutes one of the most depressed and poorest regions with widespread poverty. It is characterised by a comparatively large rural population reflecting a skewed female/male ratio in favour of females due to large-scale out-migration of adult males seeking work in urban areas both within and outside the province, widespread unemployment, and lack of access to social infrastructure and services in many areas. The region thus provides an ideal setting for investigating gender and poverty linkages.

Drawing on the literature, the study addresses the conceptual definitions and notions of poverty and explores issues on gender inequality and its effect on poverty. Paramount in explaining gender inequality are the gendered social relations between males and females brought about as a result of unequal access to economic and social resources and gendered division of labour in the household, extending to other institution sites, all skewed in favour of males. From the literature then, men and women were likely to experience poverty differently.

Using official survey data on the Eastern Cape for 1997 and 2002, the study selected and analysed indicators that correlate with poverty, based on gender. The analysis came out with strong linkages between gender and poverty. It is established from the findings that the living conditions and life circumstances of women were more associated with the characteristics of poverty than that of men, leading to the conclusion that poverty remains gendered, and men and women experience poverty differently, with women more likely to be adversely affected than men. The investigation has also established that the rural population is more likely than the urban population to be at risk to the experience of poverty in the Eastern Cape, and that the African population group was the most affected group.

In concluding, the study advocated the adoption of gender positive alleviation policy strategies that aim at improving women's access to economic and social resources. This, it is hoped, will have the effect of enhancing their capabilities and capacities. Secondly, it called for the adoption of sustainable livelihood programs, especially in rural areas where the majority of the vulnerable women reside and eke their livelihoods. It also acknowledged, in its concluding remarks, the limitations of household data in studies on gender disparities and advocated for the need to generate

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GENDER AND POVERTY: AN ANALYSIS OF GENDER - POVERTY LINKAGES IN THE EASTERN CAPE PROVINCE OF SOUTH AFRICA.

CHAPTER 1. INTRODUCTION

1.1 The problem statement

Poverty and inequality constitute the most pressing development issues in Africa. The scale of poverty in Africa is staggering and behind it is an immense scale of individual tragedy and suffering. As more dimensions are added in any assessment of human suffering, incorporating also ill health, illiteracy, isolation and insecurity, the worse Africa's plight appears to be.

Not only is poverty unevenly distributed spatially, with Africa being the most affected region since the 1970's, but also there is increasing concern in development circles about the gendered nature of poverty. The strongly held view is that as a result of gender differentials in access to economic and social resources, an outcome of "...a system of gendered social relations which shape women's and men's position within society" (Budlender, 1996), men and women are likely to experience or be affected by poverty differently. Specifically then, the study aims at investigating the validity of the notion that females are more prone to poverty and poverty processes and therefore are likely to be more affected by poverty, especially in the African context.

1.2 An overview of gender and poverty in the Africa context

According to the World Development Report 2000/2001, the number of poor people (those consuming less than \$1 a day) in Sub-Sahara Africa increased from an already high 217 million, in 1987 to 291 million in 1998 leaving almost half the resident population poor (World Bank, 2002). May (2000:2; presented 2004), in reference to regional disparities in poverty claims that, despite sharp decline in the numbers of the poor people made in China, Middle East and North Africa, the position in sub-Saharan Africa has been most severe where the numbers in poverty have grown by 73 million between 1993 and 1998.

Out of a population of 580 million in the mid-1990s, 250 million Africans did not have access to safe drinking water, over 200 million had no access to health services, about 140 million youths

were illiterate and more than 2 million children die each year before reaching their first birthday (World Bank, 1998; UNDP, 1998). The spread of the HIV/AIDS pandemic, especially in the countries of eastern and southern Africa, has compounded the gravity of the situation. The World Development Report, 1990, concluded that the “Africanization” of world poverty has continued from the 1980s into the 1990s and this accelerated throughout the 1990’s. The proportion of global poverty attributable to Africa is therefore likely to continue rising unless there are radical changes to policies and performance.

One significant trend has been the increased poverty of women, relative to men as noted in the Beijing Declaration (United Nations, 1996). Women’s lack of access to resources and basic services are combined with unequal rights in family structures, as well as unequal access to family resources such as land and livestock. In addition to this are the prevailing cultural and societal norms, which regard women as less ‘valuable’ members of society and their roles defined as ‘reproductive function’, whereas men are regarded as breadwinners providing productive roles. It is therefore strongly held that women, more likely than men, are at greater risk to experience poverty, and with more intensity.

In support of this view is the comment from the ILO, which states:

“The greatest burden of poverty in Africa is carried by the women. It is they who suffer first, and most, from the distance between their homes and clean water, the lack of efficient tools and the knowledge to use them, poor health facilities, and absence of social and public services. The problem of women’s development is thus inextricably bound up with the problem of African poverty, and it cannot be solved outside the attack on that poverty” (Killick and White, 2001; quoting from ILO, 1985).

In South Africa, apartheid has left behind a race and gender-based inequality in access to resources and services. Women’s realities in South Africa are therefore still determined by race and gender-based access to resources and opportunities. Thus African women are the ones faced with greater lack of access to resources and prosperity and therefore likely to be among the poorest of the poor. According to the UN Development Report 2000, 56% of the unemployed in South Africa were women and 44% were men as at 1999. Also, whereas 57% of Africans live below the poverty threshold, the comparative ratio for Whites was 2.1%. In addition, the Report indicated that, 49% of the poor in South Africa are African rural women.

In the African context, poverty has various manifestations, including lack of income and productive resources sufficient to ensure sustainable livelihood; hunger and malnutrition; ill health; limited or lack of access to education and other basic services; homelessness and inadequate housing; unsafe environments; and social discrimination and exclusion. Causes are varied, from an economic recession that results in loss of livelihood, or by disaster or conflict. There is also poverty caused by unemployment, poverty of low-wage workers, and destitution of people who fall outside family support systems, social institutions and safety nets. The perception is that women living in poverty are disproportionately represented than men. Contributing factors to this may be the rigidity of socially ascribed gender roles and women's limited access to power, education, training and productive resources. The application of gender analysis to the formulation of policies and programs is therefore critical to poverty reduction strategies in the African context.

1.3 Objectives of the study

The study is about gender and poverty interrelationship as it unfolds in the Eastern Cape Province of South Africa. It aims at investigating whether gender status (in the form of groups, households or individuals) relates to the experience of poverty. Specifically, the question posed by the study is that, in the face of policy measures to support women, do women remain at more risk, and disproportionately represented than men, in the experience of poverty?

The study focuses on the Eastern Cape Province as the study region, a region regarded as among the poorest in South Africa (Statistics S.A, 2002b). The Province also has the largest representation of women as well as the number of female-headed households in the country (Statistics S.A, 2002b). The question then arises as to whether the high prevalence of poverty in the province can be associated in any way with the relatively large presence of women, especially black and rural women, in the province.

The objectives of the study therefore can be summarized under three inter-related aims:

- To investigate any linkages there might be between poverty and gender.
- To ascertain whether among the poor, women are likely to experience the brunt of poverty and poverty processes more than men.
- To investigate whether, in the face of policy measures to support them, women are disproportionately represented among the poor in the Eastern Cape Province of South Africa.

The research task then is to describe the ‘poor’ in the Eastern Cape Province and to establish the existence or otherwise of an association between gender and the experience of poverty. A sub-task, also relevant to the study, is the locational dimension (in rural/ urban terms).

Findings from these investigations are to provide inputs for informed policy considerations towards providing gender-sensitive approaches to alleviating poverty in the Eastern Cape Province.

1.4 Organization of the study

The study consists of five chapters. Chapter 1 is the introduction chapter. It opens with the statement of the problem. This is followed up by an overview of poverty and gender in the African context. This section puts into perspective the nature and dimensions of poverty and gender interplay as manifested in the African and South African contexts. Following this is the section on the purpose and objectives of the study, in which three interwoven aims are identified. The chapter ends with the section on the organization of the study.

Chapter 2 presents a review of the literature. Part one explores the literature on the concepts and the definitions of poverty. This is necessary because poverty is multidimensional, and it is important to understand the various notions of poverty so as to establish their relevance to gender status. For instance whereas the maintenance of sustainable livelihoods and access to source of water and fuel for energy may mean so much to the woman, the man is likely to consider the lack of livestock or other tangible assets as poverty. The various notions of poverty in the literature are therefore explored in this section.

Part two explores the literature on gender and poverty. Various aspects of the feminization of poverty are explored and critiqued. Areas of focus include household headship and poverty, female labour force participation and poverty, sexual division of labour and poverty, the role of social norms and their effect on gender and poverty. In addition, measurement tools devised by the UNDP to capture gender disparities in development, the Human Development Index (HDI) and the Gender Empowerment Measure (GEM) are examined.

Chapter 3 is the contextual chapter. It looks at the socio-economic setting of the Eastern Cape Province in the wider South Africa context. Relevant economic and social indicators are compared

with those of the other provinces. The chapter also sets out the main needs and developmental problems facing the region as well as constraints. Demography information presented includes:

Location and size

Population by gender, race and location

Labour and employment by gender, race and location

Urbanization

Male : female composition of labour force

Quality of the labour force.

Chapter 4 is the chapter on the research methodology. It presents an outline of the methodological issues entailed in the gender and poverty analysis. The first part of this chapter deals with the measurement of poverty under various approaches. This is important because the measurement method chosen invariably dictates the direction of poverty alleviation. The second part deals with the data employed, the data type, and the data sources. The study involves analyses of secondary data, sourced from national surveys conducted by Statistics South Africa. The advantages and limitations of the quantitative study are presented and methods of data processing are explained. Also, the preferred measurement method chosen is explained and critiqued, and the various dimensions or indicators to measure are explained as well.

The dynamic nature of poverty requires that the analysis be made to reflect changes in poverty levels for a range of periods. One can then see whether the incidence of poverty is worsening or is being reduced. The approach adopted in this study therefore is to use data sets for some specific survey years. The main survey data set used for this study is the General Household Survey (GHS) 2002. Where applicable, comparisons shall be made with the October Household Survey (OHS) 1997.

Disaggregated data on the Eastern Cape Province from these surveys are used. The poverty measurement method used to separate the poor from the non-poor is the money-metric approach. Household expenditure is used as proxy for income in determining the poor and the non-poor. Limitations of the money-metric methodology as poverty measure are explained.

Chapter 5 deals with data analysis. Data on the selected indicators are analyzed using the SPSS statistical package. Receiving a more detailed attention are the spatial and gender dimensions

because poverty seems to be most prevalent and deepest in rural areas and among women. The focus of the analysis is on those in the lowest expenditure category (the poor). Poverty indicators to be analyzed include:

i) Living conditions of the poor at the household level:

- Poverty and access to type of dwelling - formal, traditional, informal
- Poverty and access to infrastructural services - source of water or distance from source
 - access to fuel
 - toilet facility type
 - refuse removal
 - telephone in dwelling

ii) Life circumstances of the poor at individual level:

Access to opportunities assisting in escaping the hardships of poverty such as education, health care, work and employment.

Analysis will be presented in texts, tables or charts, depending on the nature of the particular dimension analyzed. Outcomes will provide the basis for testing hypotheses and answer the research questions.

Chapter 6 constitutes the conclusion stage. In this chapter a summary of the main findings is presented alongside recommendation remarks.

CHAPTER 2. REVIEW OF THE LITERATURE

The first section of this chapter provides an introductory outline and review of the concepts and various notions of poverty. This is followed by the review of the literature on gender and poverty.

2.1 Defining and conceptualizing poverty

The multidimensional nature of poverty makes it very elusive in definition. The concept is therefore defined in a multitude of ways in accordance with various notions of poverty. The definition of poverty has broadened over the last quarter of a century. Beginning with a focus on market purchased goods (income) the definition of poverty has expanded to embrace other dimensions of living standards such as longevity, literacy and health. More recently the concept has developed further to reflect a concern with vulnerability and risk, powerlessness, stigma, lack of voice and civil rights. This broader conceptualization of poverty allows a better characterization of poverty, especially as experienced by women, and therefore increases our understanding of poverty and the poor, which is crucial to the design and implementation of specific programs that may alleviate poverty.

2.1.1 Income notion of poverty

The conventional literature on poverty has often seen poverty in terms of economic welfare: the inability to attain a minimum standard of living measured in terms of consumption needs or the income required for satisfying them (World Bank, 1990; cited in May, 1997). A consensus definition was that provided by Lipton and Ravallion (1997), which states "...poverty exists when one or more persons fall short of a level of economic welfare deemed to constitute a reasonable minimum, either in absolute sense or by the standards of a specific society". In this sense a person is poor if he cannot satisfy predetermined basic consumption needs.

The inability to command sufficient resources to satisfy basic physiological criteria is termed absolute poverty or deprivation, implying not having enough to eat or hunger or malnutrition (May, 1997). Material deprivation is at the core of poverty (Killick and White, 2001:8). Low incomes and consumption levels result in poor nutrition, inadequate and low quality clothing, and deficient command over productive assets and access to key social services.

While this may be a pointer to poverty, it is intrinsically limited. It reveals nothing about the health, rights and vulnerability status (to mention a few dimensions) of the person. Regarding women in particular, it ignores important aspects like lack of voice as well as hardships in meeting domestic obligations, obtaining clean water and fuel from long distances, and eking out livelihoods. Despite these limitations of the absolute concept of poverty, the material dimensions of poverty expressed in monetary value is too important an aspect of poverty to be neglected because it lends itself as a basis for reviewing other issues in the literature that have revolved around it (Lipton and Ravallion, 1997). Normative aspects like how basic needs are defined and by whom, what is an accepted minimal standard of living, and who decides what is acceptable may be questioned; but there is lack of consensus regarding the measurement of other forms of deprivation.

2.1.2 Relational notions of poverty ^{MB}

Poverty can be viewed in absolute or relative terms. In the absolute sense material deprivation is deemed critical to the very survival of the poor, whereas in relative terms the poor are also deprived but in relation to other social groups whose situation is less constraining.

Poverty can also be discerned in the manner in which people experience poverty. May and Norton (1997) claim that, at individual level poverty is perceived as lack of basic necessity and power; at household level men see poverty as lack of asset while women see it as low level consumption and inability to provide for the family (another example of viewing poverty through gender eyes), and at community level, it is seen as lack of services, assets and social cohesion. People's judgment about their level of poverty is therefore based on comparing themselves with those around them or their situations in the past.

2.1.3 Social exclusion, dependence and isolation

Further notions of poverty are social exclusion, dependence and isolation. Exclusion is seen to incorporate the lack of social ties to the family or community to which an individual belongs (Bhalla and Lapeyre, 1999). Exclusion implies being denied access to economic and social participation in the community and denial of some basic rights of citizenship (Barry, 1988; cited in May and Norton, 1997). The absence of social support brings about social isolation and

vulnerability, which invariably leads to feelings of helplessness, dependence on others and loss of dignity and inability to partake in decisions on social and civic matters.

2.1.4 Chronic and transient notions of poverty

Poverty can also be chronic or transient. Transient poverty is normally short lived and for certain periods, as many people move into and out of poverty due to short term shocks ranging from crop failures, death of breadwinner, temporary loss of employment and the likes. Chronic poverty is much more persistent in nature. Hulme and Shepherd (2003:4-5) viewed chronic poverty as occurring when an individual experiences a significant capabilities deprivation for a period of 5 years or more. It also concerns people who remain poor for much of their life course and who may pass on their poverty to subsequent generations.

Furthermore it is individuals who ultimately suffer chronic poverty. In a non-poor household it is possible that some members may suffer chronic poverty because of their gender, age or social status, and conversely, individuals in a chronically poor household may not be persistently deprived.

2.1.5 “Entitlements” and “Capabilities” notions of poverty

A marked difference from the conventional definition is the notion of poverty that focuses on well being as revealed by nutritional status, educational attainment and health status. Income may be important to the realization of these outcomes but there is no guaranteed transformation of income into these outcomes. This view forms the basis for Sen’s definition of poverty in terms of ‘entitlements’ and ‘capabilities’.

Sen calls a “capability” the substantive freedoms people enjoy living the kinds of lives they have reason to value, such as social functioning, basic education and healthcare, and longevity (Sen, 1981, 1984). Deprivation may thus be seen in terms of the failure to attain certain human capabilities that are important to a person’s well being. A person is deprived in a significant way if he does not have the capability of avoiding preventable, unnecessary morbidity, or escapable under-nourishment (Sen and Dreze, 1989:15). Thus poverty itself can be seen as a severe failure to attain basic capabilities. The advantage of this view is that it relates poverty to the failure of the ability to

achieve precisely those things that are ultimately important as compared to the more common definition of poverty in terms of inadequacy of incomes (for instance, a person's income falling below a given poverty line). In this perspective, poverty seen as a failure of basic capabilities implies a person is poor if she has to lead a deprived life.

In Sen's view, lack of secure entitlements also constitutes poverty. The bundle of commodities to consume depends on what we are able to acquire or establish command over. The set of alternative bundles over which a person can establish such a command is what Sen refers to as "entitlements". Severe lacks of these 'ownership rights', which have the effect of guaranteeing use, constitute poverty. This notion of poverty has a particular relevance to gender and poverty linkages as social norms and traditions militate against women's capacity to acquire "entitlements".

Some social relations take the broader form of accepted legitimacy in "extended entitlements". Sen illustrated this with the example of an established convention where the male head of a family receives a more favorable meat or fish in the family diet, or greater medical attention in case of illness. Even though it cannot be upheld in court the male head can be seen as having a claim of legitimacy. Such socially sanctioned rights may be extremely important in determining the level of nutrition, healthcare and education (for example girl child education) that different members of the family get.

2.1.6 Human development notion of poverty

The UNDP has played a leading role in defining poverty in terms of human development which concentrates on three aspects of human deprivation: longevity, literacy and living standards. This is a combination of the conventional (income) definitions and poverty seen through lack of health services, access to safe water and lack of nutrition in its Human Development Index (HDI). It is a relevant index used in gender analysis alongside the Gender Empowerment Measure (GEM). A more detailed exposition on this approach is presented in the methodology chapter ahead.

2.1.7 Other relevant notions of poverty

The literature on conceptualizing poverty has focused much on its economic dimensions to the neglect of political circumstances that lead to hardships. Conflicts and wars result in massive displacements of people, especially women and children, from their homes with great loss of assets

and economic opportunities. Safety and security hence need be notions of poverty. No matter one's level of income and access to basic needs, insecurity and lack of peace of mind from conflicts and wars produce uneasiness, fear and unhappiness.

Regarding human rights and poverty, practices persist throughout Africa that restricts the dignity of individuals. Common among these are debt bondages and slavery. Although slavery is outlawed in all countries, there is evidence that the practice persists, especially in West Africa, as slaves may be ignorant of their legal position and unable to seek alternative employment in any case. In Benin and Togo in West Africa, young girls (called *trokosi*) are given to traditional priests by families as atonement for certain crimes committed in the past. The girl is normally subjected to economic and sexual exploitation. Another widespread practice has been for children to be placed in the households of other families and parents are paid in return. Debt bondage is thus both a cause and consequence of poverty, with women and children more likely to be affected. The less formal yet exploitative arrangements, for instance 'sugar daddies', can be seen in the same light.

The effect of environmental degradation on the livelihoods of many people, especially women rural dwellers, makes environment a relevant area. Access to cultivable land is a crucial element in sustainable livelihoods in the rural economy. Land degradation in various forms affect yields from livelihood activities and push people onto the extensive margin of semi-arid land with highly unreliable rainfall, and/or resulting in the fragmentation of land holdings into ever smaller plots.

Furthermore, natural catastrophes like earthquakes, hurricanes and floods are normally accompanied by large-scale devastation of assets, resources and livelihoods leading to miseries and hardships. The recent destruction and devastation unleashed by the Tsunami earthquake in South East Asia is a case in point. Because more women than men are engaged in livelihood activities, they find it more difficult to recover from poverty resulting from such environmental shocks.

Finally, the HIV/AIDS pandemic has brought untold hardship, hunger and suffering to many households. Its negative impact on the labour force, labour productivity, health spending and time to care for the sick cannot be overemphasized. Not only are more women infected relative to men, but also, women undertake most care. The stigma and exclusion associated with AIDS establishes the relevance that poverty is associated with AIDS.

A central theme noticeable in the review on conceptualizing poverty is that the various notions outlined entail gender dimensions, pointing to the position that men and women's experience of poverty may differ. This being the case, a basis is laid for an exploration of the interrelationship between gender and poverty and poverty processes.

2.2 Poverty and gender inequality

Poverty is not gender neutral. A lot has been said, done and published on the topic of gender and poverty. The Beijing Declaration Report on the unequal status of women, states: "... inequalities between women and men persisted, and this situation is exacerbated by the increasing poverty that is affecting the lives of the majority, women and children in particular" (United Nations, 1996).

Research has demonstrated the disparities between men and women in access and control over economic and social resources, credit, technology, education, health and employment (Bullock, 1994; Patel, 1996; Commission on Gender and Equality, 1998). Women's inequality in household decision-making and household and public participation is a well-documented fact (UNDP, 1999). In many developing countries women occupy the group at the bottom of the ladder with respect to employment, education and training, and status (Mosaka-Wright, 1995). Even where women gain access to land, a crucial need of rural dwellers, their right to the land is limited as it depends on their link to a man: the community leader, husband, father or son (not daughter). Women are therefore placed in a disadvantaged position resulting in severe limitations on their capacities to escape poverty.

An important factor accounting for gender inequality is the asymmetrical nature of social relations existing between men and women. Social relations in the household are gendered and are skewed in favour of men; and these relations are not limited to households but are carried on to institutions outside the household. Thus within each household and other social groups, men and women are involved in bargaining over resources and obligations. Social relations in the household as well as in institutions outside the household are therefore both crucial in explaining the gender disparities in status.

2.2.1 Social relations in the household

The household is a key site of gender discrimination and subordination and, thus, is an important focus for examining gender and poverty issues. It is therefore important, as a start, to explore in some detail what the concept “household” entails.

There is no straightforward or formal definition of household in the literature. The Project for Statistics on Living Standard and Development (PSLSD) survey, 1994, for instance, defined household as a group of people who contribute to or share in a common resource pool. In addition, the group must be living in the same house, eating, sleeping, and participating in productive economic activities (paid or unpaid) within or outside the house. These groupings are usually based on some kind of family or kinship relationships.

In development policy the typical view describes household as consisting of a man, the wife (or wives) and their children. The male breadwinner is usually regarded as the household head and is usually charged with the responsibility of supporting the family. The wife (wives) is responsible for keeping the house, caring for the children and other members of the household, and is sometimes engaged in paid work outside the home for supplementary income. Readily discernible from this description is the notion of sexual division of labour in the household, which is patriarchal in nature. How relevant is this to the position (poverty wise) of the woman, one may ask.

Social relations in the household are crucial to understanding the disadvantaged position of women relative to men. Relations in the household are depicted as a male breadwinner making decisions on behalf of a dependent housewife who was primarily concerned with childcare and housework. Kabeer and Subramanian (1996) note that it is precisely such a depiction of household which led to the bypassing of female-managed farming households in rural Kenya, as well as for the targeting of male household heads for the distribution of productive resources in the Mahaneli scheme in Sri Lanka.

Budlender (1996) observes that much of women’s disadvantage is rooted in the sexual division of labour where women generally bear a greater burden than men of the reproductive tasks and domestic work, tasks usually unpaid and undervalued. In addition, many women take on extra productive work, over extended periods, in order to supplement household income. According to Budlender, the combination of reproductive work, poorly paid productive work, and community

work, places a great burden and stress on women. In the South African context, she claims, women's unpaid work includes conventional housework, childbearing and childrearing, fetching of water and fuel, and subsistence agriculture in the case of rural women.

Thus gender affects access to control over and the use of resources (land, tool, labour) as well as expenditure. In addition, people's responsibilities, activities and daily life experiences are affected by gender. Trends show that women in particular are affected by high rates of unemployment due to their movement in and out of the labour force for domestic reasons, their relatively low level of education, and their restricted occupational and geographic mobility. It is clear from the foregoing that, generally, the experience of poverty by women is different and likely to be more extreme than that of men.

2.2.2 Social relations in institutions outside the household

The processes by which gender inequalities are socially constructed are not confined purely to households and family relationships but are reproduced across a range of institutions. The concept 'gender' emerged as a way of distinguishing between biological difference and socially constructed inequality while the concept of 'gender relations' sought to shift attention from looking at men and women as isolated categories to looking at the social relationships through which they were mutually constituted as unequal social categories (Whitehead 1979; Elson, 1991; cited in Kabeer et al, 1996). Thus gender relations are products of the ways in which institutions are organized and reconstituted over time.

Kabeer identifies four institution sites, which construct gender relations: the state, the market, the community and the domain of family/ kinship. Different institutions may operate with their own distinct ways of doing things, she notes, but "...there are certain common norms and assumptions which cut across the different institutional sites, leading to the widespread construction and reinforcement of certain social inequalities, although they may vary across cultures". These interrelated elements - rules, activities, resources, people and power - operate to produce unequal gendered outcomes.

For instance if men are culturally defined as main breadwinners, they are also not only likely to be favoured in the intra-household distribution of resources and claims on household product but the norms and values are rearticulated in the operations in the apparently gender-neutral institutions of

the market and the state. Thus material resources, employment opportunities and key decision-making positions tend to be implicitly offered to men on privileged terms.

Kabeer cited Kapodia's work (1992) on agricultural labour markets in Tamil Nadu where men were paid double the female wage for the same period of field labour because it would have been considered deeply humiliating for a man to be paid the same as a woman, even for the same work; a differential had to be observed to signal the superior status of men.

Understanding gender inequality through an institutional perspective is of utmost relevance to the present study. It helps to emphasize the complex ways in which institutional rules, cultural norms and routine practices from different institution sites intersect to produce and sustain gender inequality across society.

2.2.3 Female headship of household and poverty

There is a general perception of an increasing incidence of female headship on a global scale and an association of this with the feminization of poverty. According to Folbre (1986), the increasing trend may be due to family disintegrations or breakdowns. Female headship may also result from either out-migration of male heads while others may be naturally female headed because the woman has no permanent partner or decides to stay single (Archer and Lloyd, 1985).

Female-headed households are generally characterized as poor relative to male-headed households. Female heads of household tend to be younger (except in the case of *de jure* widows) and less educated than their male counterparts. They also have less land to work as well as less capital, inputs, and farm labour to work it with. Widows may have their lands taken from them, so that they are forced to become dependent. These households often suffer from increased malnutrition and food insecurity. In rural households in particular, women toil long hours in the field, rear domestic livestock, keep vegetable gardens, fetch water, cook and take care of the children, the aged and the sick. The above scenario suggests a link between female headship and poverty.

Buvinic and Gupta (1994), in support of this view, argue that female heads of households are more likely to be poorer, relative to male heads, because of higher dependency ratios, fewer assets, less access to high paying employment and production resources, and long hours of domestic labour. In addition, this group is faced with time and mobility constraints where they must combine

productive and reproductive roles and face discriminations in access to jobs. They however caution that female-headed households might not necessarily be poorer.

According to Moore (1994:10) the straightforward assumption that poverty is always associated with female-headed households is dangerous since it rests on a prior assumption that its members will be worse off because they represent incomplete families. She argues that some female-headed households are in fact better off than male headed ones. This view is buttressed with evidence from Buvinic and Gupta (1994). They reviewed 61 studies examining the association between female headship and poverty and found that in 38 cases, female-headed households were over-represented among the poor, but not others; or were over-represented among the poor on certain indicators but not others. They also found that there are particular types of female-headed households, which are especially vulnerable to poverty: these include widowed female heads, those separated from their husbands and with dependent children, as well as single mothers and de facto female household heads in situations of migrant labour where remittances are not forthcoming, (Buvinic and Gupta 1994:15). The position of female-headed households with no economically active male (either present or working elsewhere) is also severe. The lack of able-bodied male labour is a key characteristic of many of the poorest households. Women (wives, grandmothers, and sisters) must then assume complete responsibility for raising, feeding, and educating young children.

Thus the evidence shows that the relationship between female headship and poverty is not straightforward. Not all female-headed households are poor. Distributional issues also need to be considered: since female-headed households may have a more egalitarian distribution of resources, women and children in such households could be better off than in a male-headed household even if the overall income in the household is relatively low.

2.2.4 Eternalizing gender inequality

The disadvantaged position of women, vis-à-vis that of men can be traced to the tendency to depict gender relations as unchanging or unchangeable. Kabeer and Subramanian (1996) argue that biological determination, particularly the tendency to attribute certain roles and tasks to women and men on the basis of some notion of 'natural' suitability, is a form of attempt to make eternal gender inequality. A classic example, as noted by Yates (1994, cited in Kabeer), is the resort to biological determinism in the Ghanaian vocational education policy document in order to justify the delivery of gender segregated vocational education:

“...By their very make up biologically, nature has made women comparatively more delicate than men physically. There are therefore some trades which do not suit women. ...Skills, which require physical strength do not often suit women. Vocational skills, which require deft hands, aesthetics and accuracy of taste by tongue and many such as those, suit women. Examples are hairdressing, dressmaking, cookery ...”

Yet in Ghana, according to Kabeer, women are known to work long hours in agricultural production and have some of the highest rates in trading, and exercise considerable economic autonomy.

2.2.5 Gender inequality and feminization of poverty

In the global context, a number of factors have combined to push women into poverty and/or entrench them in poverty. Firstly, structural adjustment programs have led to increased unemployment and underemployment, with particular impact on women who mostly constitute the vulnerable and disadvantaged group. Adjustment programs in the Less Developed Countries have also led to reductions in social expenditures, thereby adversely affecting women, as responsibilities for basic social services have shifted from governments to women.

Secondly, economic recessions in most countries have had a disproportionately negative impact on women's employment. Women often have no choice but to take employment that lacks long term job security, involves dangerous working conditions, and are under-remunerated, seeking to improve household income; while others decide to migrate for the same purpose (World Bank, 1996: The Beijing Declaration). Without any reduction in their responsibilities, this has increased total burden of work for women.

Thirdly, the process of liberalization and globalization has resulted in restructuring of sectors in which women work: social services, light labour intensive manufacturing in the clothing, textile and leather industry, cleaning services, catering and agriculture (Mies, 1994). More flexible working conditions in which women work, on casual and temporary basis, has meant that women earn less and forgo benefits. They are also likely to lose jobs as a result of mobility of capital. The new feminized labour force in South Africa, according to Mies, is the black working class woman from sub-economic communities and informal settlements, who sees any employment as a necessity, regardless of pay or conditions.

Fourthly, family disintegration, population movements between urban and rural areas within countries, international migration, war, and internal displacements are factors contributing to the rise of female-headed households; and female-headed households are very often among the poorest due to gender-based barriers as previously explained. In addition to this, continuing environmental degradation has a more direct impact on women. Pollution and toxic wastes, deforestation, desertification, soil depletion and drought affect rural indigenous women mostly, whose livelihood and daily subsistence depends on sustainable ecosystems. Furthermore, women, especially young women are more vulnerable to AIDS/HIV infection. AIDS negatively affects not only productivity of the sufferer but demands care, which places additional strain on women, being traditional caregivers.

Finally, throughout their entire life cycle, women's daily existence and long-term aspirations are restricted by discriminatory attitudes, economic structures and lack of resources that prevent their full and equal participation. The girl child of today is the woman of tomorrow. 'Son preference' is a common practice in many countries. Access of the girl-child to education, nutrition, health and economic opportunity is often curtailed at the expense of the boy-child. The girl-child is often subjected to various forms of sexual and economic exploitation. Such childhood disadvantages put them at more risks of growing into poverty as grownups. Life cycle fluctuations also reveal gender differences in poverty: pregnant women or older women may be particularly prone to poverty, just as divorce or desertion may leave women destitute.

2.2.6 Outstanding issues on gender and poverty

While sufficient evidence from the literature points to gender correlating to poverty, there is the lack of empirical studies to validate this assertion. Most writers are in agreement that women and men experience poverty differently but disagree to a straightforward co-relationship between gender and poverty (Bunivic and Gupta, 1994; Moore, 1994). They contend that females are not generally over-represented in consumption poor households, nor are female-headed households more likely to be poor as a rule. Further evidence in this regard appears in Lipton (1983a); Dreze (1990); Lloyd and Brandon (1991).

Problems constraining empirical studies on gender and poverty go back to the nature of the household itself. First lack of data on intra-household distribution limits such studies. Gender disaggregated data on income and other measures are very difficult to come by. Moreover most

household data tend to assume equal distribution of resources within the household. Differentials between men and women in terms of their access to income, resources and services are often neglected. Such differentials may occur within households between men and women, or between households, with women-headed households at a disadvantage. There are also gender-based differentials in vulnerability to illness and violence. The result is underestimation of the extent and depth of poverty particularly among women and children.

Secondly, although dimensions of poverty are similar among men and women, their priorities differ significantly. Women, for instance, may place greater importance on food, water, fuel and health, while men stress the importance of economic activities (often visible productive assets such as cattle) that are not related to the immediate needs of their families (Killick and White, 2001). Since women have less bargaining power to control family resource allocation, they tend to endure more hardship in providing those needs.

Nonetheless, even if women are not over represented in poverty in relation to men, they are severe victims of poverty in other respects. Women work longer hours than men to achieve the same level of living. The burden of both parts of the “double day” –market labour and domestic labour – is more severe for poor women (Lipton and Ravallion, 1995). They also face lower chances of independent escape from poverty, in part because women’s large share of domestic commitments prevents them from seizing new profitable work opportunities as readily as men (Haddad, 1991; Berhman, 1985; cited in Lipton et al, 1995). In addition, in some cultures, widows face effective barriers against employment or remarriage, and are treated as second-class citizens within the home, leading to high risks of poverty (Dreze; 1990).

Furthermore, female heads of households may face greater difficulties than male heads in gaining access to labor markets, credit, housing and basic services, and there are sometimes additional layers of discrimination against female heads. Single parent households, most of which are also female-headed, face the difficulty of one adult having to combine income earning with household management and child rearing. This generally means that the parent can only take part-time informal jobs with low earnings and few, if any, fringe benefits.

In concluding, although a concise relationship has not been empirically established between gender and poverty in the literature, the literature abounds with relevant pointers to gender inequalities and the associated likely disparities in the experience of poverty. From the literature, it is more likely

the case that, women are more affected by poverty and poverty processes than men. It is in the belief of this view that multilateral and bilateral development agencies have focused their gender policies on the presumed connection between gender inequality and an increase in the incidence of poverty. According to UNDP's *Poverty has woman's face*, of 1.3 billion people living in poverty, 70% are women (UNDP, 1995). Though based on questionable assumptions, such statements are source of encouragement for the need to formulate gender-sensitive approaches to poverty alleviation especially in developing countries. It also calls for the need for further research into gender-poverty linkages.

2.3 Measuring gender disparities in development

Standard income/expenditure data fails to capture the complexity of gender differences in poverty and gender differentiated assessment of well being. It ignores the broader indicators of well being like health indicators (e.g. nutrition, life expectancy, and maternal mortality) and access to resources by women (e.g. employment participation and earnings, land ownership, and access to safe water and sanitation). These reflect the outcomes of income/expenditure decisions rather than the means whereby well being is achieved (Kabeer, 1996). Useful approaches devised by the UNDP in capturing gender disparities are the Gender-related Development Index (GDI) and the Gender Empowerment Measure (GEM). The GDI attempts to capture gender disparity in achievement in a set of basic capabilities such as life expectancy, educational attainment and income. The GEM measures gender inequality in key areas of economic and political participation and decision making, such as seats held in parliament, and percentage of managerial positions held by women.

Furthermore, there is increasing emphasis on self-assessment of poverty leading to issues such as domestic violence and social support networks becoming part of mainstream poverty debate. From a gender perspective, this opens up the possibility for highlighting the gender-specific dimensions of deprivation through concepts of vulnerability, shocks, fluctuation and powerlessness (Baden and Milward, 2000). However, participatory methods for assessing poverty can obscure gender specific interests unless careful contextual analysis is carried out (Cornwall, 2001).

2.4 Trends in gender disparity in South Africa

The focus of this study is conceptualizing poverty as the hardships endured in the life circumstances and living conditions of women and men in the context of their different roles and positions in society. Gender statistics being examined therefore focus on issues of particular relevance to women and men and compares any relative disadvantages.

2.4.1: The incidence of poverty in South Africa



Based on a household expenditure poverty line of R400 in 1989, poverty in South Africa increased from 51% in 1989, through 55% in 1997 and to 62% in 2001; and racial and gender disparities in the incidence of household poverty remained great during the period (Statistics South Africa, 2002a). According to Woolard (Woolard, 2000) poverty is concentrated in the former homeland areas, mainly in the Eastern Cape, Limpopo, and Kwazulu-Natal. The population of these areas is largely rural and lack of access to employment is arguably the single greatest cause of rural poverty. This is aggravated by the lack of access to productive resources. Furthermore, according to the UNDP Report, 2003, women constituted about 52% of the population of South Africa. As at 2002, 54.4% of all poor South Africans were females, and Africans were the most impoverished segment of the population, constituting 91.1% of the 21.9 million poor South Africans.

With the 1993 SALDRU data as source, Woolard claims female-headed households were more likely to be poor than male-headed households: a de jure female-headed household has 48% chance of being poor, by contrast, a male-headed household has 28% chance of being poor. May et al (1997:37) made reference to the prevalence of female-headed households, as a consequence of the migrant labour system, and the disillusioned women whose male partners fail to send remittances. Most female-headed households are also single parent households (and most often 'granny households' i.e. the head is the grandmother rather than the mother of the children in her care).

2.4.2: Trends in experiential aspects of poverty

While life circumstances and living conditions for the majority of South African households have shown improvements between 1995 and 2001 (Statistics SA, 2002c: Men and Women in South Africa: Five Years On) more women than men are likely to still experience hardships. Statistics on

relevant indicators selected from this Report (Men and Women in South Africa) establish the following trends:

- Access to water: The majority of South African households utilizes piped water source either inside their dwellings or on site. However, as at 1995 and 1999, 30% and 34% respectively of households were reliant on off site public taps, springs, streams, boreholes, dams etc. often involving long distances and time. The proportion of African households reliant on outside sources of water increased from 40% and 45% between the two years. In all cases, a larger proportion of female than male members of the household are likely to be involved in the water collection.
- Access to fuel: In 1995, a quarter (25%) of all South African households used wood or dung as their main fuel for cooking. This proportion had dropped to one-fifth (20%) by 1999. Urban households are less likely than rural ones to rely on wood and dung, and higher percentage of females than males spend time on this activity, which often involves great distances.
- Access to health and care facilities: The relevance of access to health and care facilities stems from the fact that where healthcare is not available outside the family, it is usually the female members of the household who are responsible for the task. Utilization of health facilities however is a matter of choice by individuals as well as households.
- Educational achievement: Between 1995 and 2001 there has been a decrease in the percentage of men and women, aged 25 years and older, without formal education from 36% to 27.5%. However, African women remain the group with the highest proportion of people without any formal schooling. In 1995, 44% of females compared with 28% of males had no schooling, and in 2001, 33% females compared with 22% males had no schooling.
- Employment status: Within each population group, a smaller proportion of women than men in the age group 15 to 65 years were employed. Among men, while 73% of Whites were employed, only 43% of Africans were employed as at 2001. The corresponding percentages of women employed in the same year were 54% and 36% respectively.

- The percentage employed (15-65 year olds) in 2001 was larger than the percentage employed in 1995 for all population groups. Among women, the percentage employed in 2001 was larger than the percentage employed in 1995 for all population groups but most marked for African women. Less than a quarter (23%) of African women was employed in 1995 compared to more than a third (36%) in 2001. Despite the relatively large increase between 1995 and 2001 in the percentage of women employed, a greater percentage of men than women continued to be employed in 2001.
- Other work related aspects: As at 2001, within each population group, and in both urban and non-urban areas, the unemployment rate was higher for women than for men. The official unemployment rate was highest among urban African women (35.7%) and lowest among non-urban white men (4.9%). Formal sector work more common for men than women; just over half (52%) of employed women work in the formal sector, compared with close to three-quarters (74%) of employed men. Between 1995 and 2001, there has been an increase in the percentage of women employed in primary industries, domestic work and other unskilled occupations. More men are found in top earning categories compared to women.

2.4.3: Efforts and progress in improving conditions

Improved access to infrastructure, services and amenities has been a major challenge of the post apartheid government. Improvements since 1994 include the provision of electricity, water (for home use and production), communications, education, health care, housing, refuse removal, etc. Orange, (2003) made a comparative analysis of the 1996 and 2001 Census data on vulnerable and special target groups and arrived at the following findings:

- Type of dwelling: The proportion of African households living in formal type dwelling increased from 42% to 51% between 1996 and 2001
- Access to water: The percentage of households with access to clean piped water grew nationally. Percentage of Africans depending on stream, spring, and other outside sources dropped by 6.7% from 22.5% in 1996 to 15.9% in 2001. But there have been drop in absolute numbers of households with water in dwelling perhaps due to affordability
- Energy: There has been a significant increase in percentage of households with access to electricity from 58.8% to 69.7% (electricity for lighting).

- Refuse removal: There has been a 2.9% increase in households that had refuse removed by local authority at least once a week
- Telephone services: Huge gains were made countrywide in access to telephone services from 28.6% to 42.4%
- Highest level of education: The percentage of females (20 years+) with no schooling decreased but still remained higher than males in the same category. Women with matric increased from 15.9% to 19.5%, up by 3.6%; however less than 4.5% increase in the case of males. In terms of numbers, almost half a million more women had a higher qualification in 2001 than in 1996
- Employment and occupation: While employed women rose by 356 000 between 1996 and 2001, the number of unemployed women increased just over a million. Women in professional occupations declined by 6% but rose in technicians and associates category by 6.6%.

Overall, Government programs have led to improvements in people's quality of life in a number of areas most particularly through investment in infrastructure and service access. However, these improvements are not as widely shared as they might be owing to a steep increase (of 24% between 1996 and 2001) in the number of households that need them (Aliber, 2002a). Moreover, notwithstanding the large strides in improving conditions, even where services are present, there is often lack of access to these by the most marginalized members of communities. Prohibitive traveling costs to facilities are a good example. May et al (1997:61) point out to a situation where people may find it difficult to be at a clinic during the times it is open.

2.5 Conclusion

The foregoing chapter has explored the literature on the various concepts and notions of poverty and their relevance or otherwise to gender and poverty. It has also explored the literature on poverty and gender inequality, touching on relevant aspects including social relations in the household and in institutions outside the household and poverty; female headship and household poverty; eternalizing gender inequality; gender inequality and the feminization of poverty; and a number of other related issues. Also reviewed are the gender and poverty trends in South Africa and efforts and progress made at improvements. From the literature, there appeared to be a strong basis for

gender disparities in poverty. The nature and extent of the gender inequality in poverty shall be the main task to be undertaken in chapter five of the study, under the heading analysis and interpretation

It is indicated that the present study shall focus on gender disparities in the life circumstances and living conditions in a particular province of South Africa, the Eastern Cape Province, regarded as one of the poorest in the country. In the next chapter then, the socio-economic background of the study region is presented.

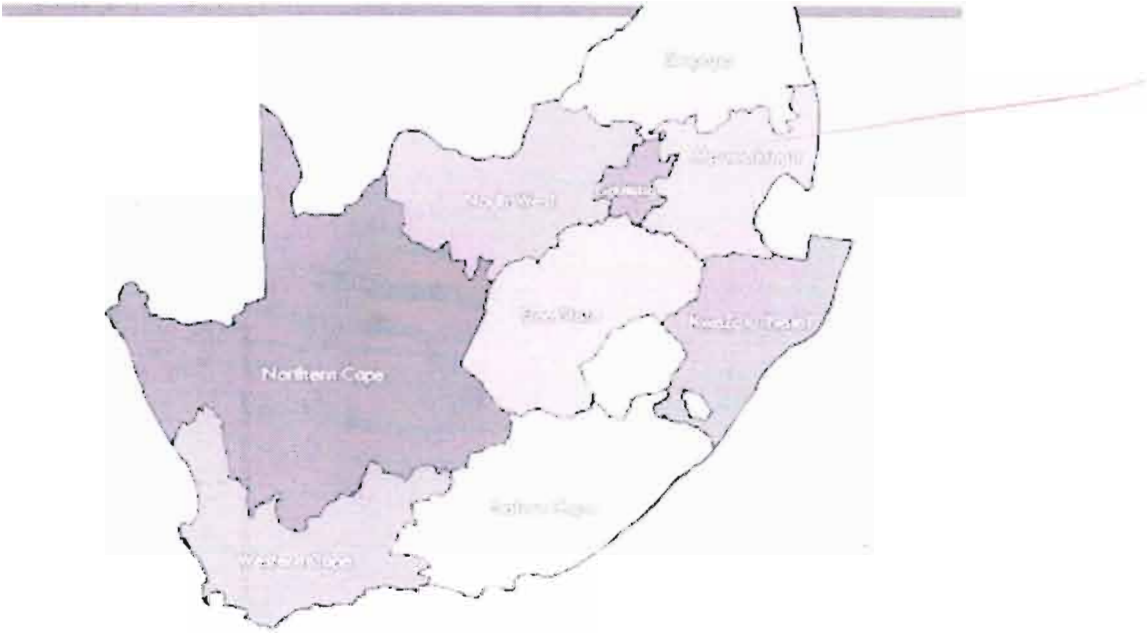
CHAPTER 3. SOCIO-ECONOMIC BACKGROUND OF THE EASTERN CAPE PROVINCE OF SOUTH AFRICA

3.1 Location and size

The Eastern Cape Province is situated on the southeastern side of South Africa. It encompasses what was traditionally known as Eastern Cape, the two former independent territories of Ciskei and Transkei, and the Border area stretching from East London to Aliwal North.

With an area of 169 580 sq km it is the second largest of the nine provinces in South Africa, second after the Northern Cape Province and accounting for 14% of the total area of the country.

Fig 1: Provinces of South Africa



3.2 Population profile

South Africa’s population was 44.8 million as at 2001 (Census 2001). It had increased to this number from 40.6 million. in 1996. Of the total number of people living in South Africa as at 2001, 6.44 million or 14.5% live in the Eastern Cape Province, the third largest concentration of people in South Africa after Kwazulu-Natal (9.4m) and Gauteng (8.8m), as shown in Table 1. The population

growth rate of 2.6% p.a. in the Province compares favourably with the national average of 2.5% p.a. As at 2001, the Province had the fourth largest population density with approximately 40 people per sq. m. Population density ranged from 2 people per sq. m. in Northern Cape Province to 460 in Gauteng.

Table 1: Distribution of the population of SA by province and by sex, 2001

Province	Population	% Population	% Male pop	% Fem pop
East Cape	6.4m	14.4	46.7	53.3
Free State	2.7m	6.0	47.9	52.1
Gauteng	8.8m	19.7	50.3	49.7
Kwazulu-Natal	9.4m	21.0	46.8	53.2
Limpopo	5.3m	11.8	45.4	54.6
Mpumalanga	3.1m	7.0	47.9	52.1
Northern Cape	0.8m	1.8	48.8	51.2
North Western	3.7m	8.2	49.6	50.4
Western Cape	4.5m	10.1	48.5	51.5
South Africa	44.8m	100	47.8	52.2

Source: Census 2001; Census in brief

In the country as a whole, and in all provinces except Gauteng, there were a larger proportion of females than males. The national average proportion of female population was 52.2% compared to 53.8% for the Province, the second highest concentration of females after Limpopo Province' 54.6%.

Table 2 shows that Africans constituted the majority of the population in all provinces except Northern Cape and the Western Cape where Coloured were in the majority. The national average percentage of African's population was 79.0% compared with 87.5% for the Eastern Cape.

Table 2: Population by province and population groups

Pop Group	East Cape	Free State	Gauteng	KZN	Limp	Mpum	North Cape	North West	West Cape	SA
African	87.5	88.0	73.8	84.9	97.2	92.4	35.7	91.5	26.7	79.0
Coloured	7.4	3.1	3.8	1.5	0.2	0.7	51.6	1.6	53.9	8.9
Indian/Asian	0.3	0.1	2.5	8.5	0.2	0.4	0.3	0.3	1.0	2.5
White	4.7	8.8	19.9	5.1	2.4	6.5	12.4	6.7	18.4	9.6

Table 2 shows that Africans constituted the majority of the population in all provinces except Northern Cape and the Western Cape where Coloured were in the majority. The national average percentage of African’s population was 79.0% compared with 87.5% for the Eastern Cape.

Nationally, 53.7% of the population of South Africa lived in urban areas as at 2001. The comparable figure for the Eastern Cape Province is 36.6%. Generally, the non-urban population in South Africa is overwhelmingly African.

It is clear from the above demographic information that the province is predominantly a home to African population, mostly living in rural areas, and the majority of whom are women. This sets out African, rural women as the target of focus in this study.

Other noticeable features about the population profile of the Eastern Cape Province, which conforms to the national trend, are:

- The African population is gradually increasing in size both in actual numbers and also in the proportion it represents of the total population, while the previously most privileged group, the Whites, is estimated to be growing rather very slightly in actual numbers, but gradually shrinking proportionately; and
- The age distribution of the African population resembles the structure of a developing rather than a developed country, with proportionately more young than older people; while the age pyramid of the White population depicts relatively few children and a larger proportion of adults and older people, typical of a developed country. These have implications for any future efforts to address past inequalities.

3.3 Labour and employment

South Africa's labour force (population between 15 and 65 years) was estimated at 26.3 m. as at 1999 (OHS 1999). This is considered to be the population of working age. Table 3, created from the Labour Force Survey (LFS) 2001, shows the labour market status of the Eastern Cape Province in the wider South African context.

Table 3: Proportion of working age population by labour market status, Eastern Cape

Labour market status	% Eastern Cape	% South Africa
Employed	31.4	39.6
Unemployed *	14.8	16.5
Not economically active	53.8	43.9
Total	100	100

Source: Compiled from LFS September 2001

Note: * Strict or official definition.

The percentage unemployed is not the unemployment rate, it is the proportion of the entire working age population who are unemployed.

According to the table, the Eastern Cape had a lower proportion of employed (31.4%) and a higher proportion of not economically active (53.8%) than South Africa as a whole (39.6% and 43.9% respectively). The labour participation rate for the Province is the second lowest in South Africa, a bare 46% compared with the national average of 56 % as at 2001.

Unemployment is rife in the province. The official unemployment rate of 32.0% (strict definition; LFS 2001) is the third highest in the country after the Limpopo and Kwazulu-Natal provinces. The rate for South Africa as a whole, as measured by the LFS is 29.5 %. The Census 2001 source however establishes the Eastern Cape as the province with the highest unemployment rate, 54.6%, compared with a national average of 41.6%.

In South Africa in general, there are marked differences in unemployment rates according to sex, place of residence (urban or rural), and population group. Table 4 depicts unemployment rates by sex and population groups.

Table 4: Unemployment rates by sex and population groups, Eastern Cape (Percentages)

	LFS 2001	Census 2001
Average males	26.1	35.8
Average females	33.3	48.1
Black African male	32.2	43.3
White male	4.9	6.1
Black African female	35.9	57.8
White female	7.6	6.6

Source: Compiled from unemployment rates data in Census 2001 in Brief

Table 4 shows that the unemployment rate was highest among women and especially African women (irrespective of whether LFS or Census data was used). By implication then, since 64% of the population of the Eastern Cape reside in rural areas, unemployment rates in the province are highest among the African, female, rural dwellers.

In general, irrespective of the province, the labour market shows the following trends in South Africa over the time period 1995 to 1999 (Statistics South Africa, 2001):

- the number of economically active people has been increasing gradually over time (12.8m to 13.5m) whereas those who were economically active, both the employed and the unemployed, has increased more rapidly (from 11.4m to 12.8m).

- the number of employed people has been increasing, also at a very slow pace (from 9.6m to 10.4m) whereas the number of unemployed has increased rapidly over time (from 1.8m to 3.2m)
- This means that new job creation in both the formal and informal sectors is not keeping pace with demand for work, a situation that embodies grave consequences for the well being of many, especially African rural women.

3.4 Education and quality of the labour force

Table five below shows the distribution of those aged 20 years and over according to the level of education attained.

Table 5: Highest level of education by province amongst those aged 20 and over (percentage)

Pop Group	East Cape	Free State	Gauteng	KZN	Limp	Mpum alanga	North Cape	North West	West Cape	SA
No schooling	22.8	16.0	8.4	21.9	33.4	27.5	18.2	19.9	5.7	17.9
Obtained Gr. 12	14.1	17.5	28.0	19.8	14.0	18.2	16.5	18.5	23.4	20.4
Tertiary	6.3	6.3	12.6	6.9	6.8	5.9	6.1	5.9	11.2	8.4

Source: Compiled from Census in Brief; 2001

Of the 25.5m people in South Africa aged 20 years or more, 3.3m live in the Eastern Cape as at 2001 (Census 2001 in Brief). Out of the number living in the Eastern Cape, 22.8% had no schooling, 14.0% completed Gr. 12, and a further 6.3% had tertiary education; compared with national level, where 17.9% had no schooling, 20.4% completed Gr. 12 and 8.4% had tertiary education.

Distribution by sex in the Province shows that 463 000 out of the 744 000 (62.0%) of people with no schooling in the 20+ age category were females. Regarding tertiary education, 30.0% of white women and 34.0% of white males in this age category had received tertiary education (Census 2001 in brief; p. 46). This results in the existence of a large pool of unskilled or semi-skilled workers mainly employed as production workers and farm workers. Managerial/Professionals in the Eastern

Cape account for only 10.9% of those in formal employment compared with 12.4% South African average for this category (Census in brief; p. 47), with most women in this category in the services sector as nurses and teachers. The shortage of managerial, executive and administrative workers puts constraints on the entrepreneurial growth and hence severe limitation on future growth potential of the province.

3.5 Nature of the economy and production activity

Real Gross Domestic Product (GDP) per capita has increased steadily over time for South Africa as a whole and in all the provinces. South Africa's GDP per capita, in US\$ Purchasing Power Parity terms, increased from \$3 890 p.a. in 1991 to \$5 920 p.a. in 1996 (Stats in Brief, 2000). In 1996, the Eastern Cape had the second lowest GDP per capita at \$2 860 p.a. after Limpopo at \$2 380 p.a.

Although the Province ranks fifth as contributor to aggregate GDP, its proportionate contributions in the key sectors of manufacturing and agriculture are meager, 9.3% and 5.9% respectively. The region does not have absolute advantage in any single sector. It however has some comparative advantage in transport assembling, animal and animal products, forestry, and tourism (Eastern Cape Development Corporation, 1995).

The Human Development Index (HDI) of the UNDP is used for obtaining internationally comparable indications of the abilities of individuals within or across countries and regions to live long, informed and comfortable lives (UNDP, 2003). The Eastern Cape Province had the third lowest HDI in 1996, at 0.643, after the North West and the Limpopo. That of Gauteng was 0.771 and the national average was 0.688.

The economy of the Eastern Cape Province is dualistic in nature. There exist inner core areas with first world characteristics in terms of infrastructure that supports industrial and other economic activities, lying side by side with outer peripheries that are seriously lacking in economic and social infrastructure and have remained stagnant and highly depressed. The previously white Port Elizabeth/Uitenhage area and the former Border corridor of East London and King William's Town constituted the inner core, whereas the outer periphery consisted predominantly of the two former homelands of Ciskei and Transkei, and the Port Elizabeth hinterlands.

The dualistic nature of the economy had succeeded in setting in motion migration and urbanization trends that contributed in entrenching poverty in the province, especially among women and non-urban dwellers. Functional urbanization trends reflect the heterogeneous nature of the province. Urbanization rate varies from a high 89.0% for Port Elizabeth/Uitenhage, through 35.0% for Ciskei to 15.0% for Transkei. Urbanization in the province is greatly influenced by inter-regional migration in response to availability and expansion of local job opportunities.

Of particular significance is the effect of the rural-urban migration on the male/female composition of the economically active urban population. The male/ female composition of the urban population varies between the metropolitan core and the peripheral areas. The Port Elizabeth/Uitenhage area, for example, attracts a large number of male migrant workers hence males comprise 55% of the 15-65 year old population. The comparative figure for Ciskei is 42% and for Transkei, 33%. Although much has changed over the years, the districts of Cofinvaba and Engnobo in the Transkei had only 28% male presence as at 1991 owing to the lack of local employment opportunities (DBSA, 1991).

In sum, as the pattern of movement into urban and non-urban areas at different life stages affects mainly Africans, and it is most marked among the working age African men than it is for African women, the result is the existence of large concentration of the young, the elderly and women in the rural areas of the Eastern Cape. Under such circumstances, female-headed households become the norm and this has implications for the experience of poverty and poverty processes, an important area of investigation by this study.

3.6 Households access to infrastructure and services in the Eastern Cape Province

This study is based on the recognition that providing better infrastructure and services to households such as adequate housing, clean water, electricity, and sanitation will go a long way in alleviating poverty affecting households. It is considered that inadequate provision of household infrastructure and services puts extra burden on women in particular and negatively affects their well being more than that of men. It is therefore important to look at household's access to infrastructure and services in the Eastern Cape Province so as to ascertain the living circumstances and living conditions among the households.

3.6.1 Access to housing

The Eastern Cape had the lowest percentage of formal household types (47.3%) and the largest proportion of traditional dwelling types (38.1%) in the country. In South Africa as a whole the comparative figure is 63.8% and 14.8% respectively, implying about two-thirds of all households in South Africa live in formal dwellings (Census in brief; p. 76). Overall for the country, more households in urban (74.7%) than in non-urban (63.3%) areas were living in formal dwellings. Informal dwellings were the second most common dwellings in all urban areas.

In the Eastern Cape the average household size was 4.1, compared with the national average of 3.8. It is the third highest after Limpopo, 4.3, and Kwazulu-Natal, 4.2 (Census in brief; p. 72).

3.6.2 Household main source of water

In South Africa, 72.0% of all households had access to piped water in the dwelling, on site or within 200 meters, while the rest may use some combination of rainwater and water from boreholes, streams and dams obtained from different distances. In the Eastern Cape, 62.0% of households had access to piped water either in the dwelling or on site or from a communal tap compared with 98.0% for the Western Cape and 84.0% for the national average. (Census in Brief, 2001). The figure for the Eastern Cape was the least, and non-urban areas were worst affected.

3.6.3 Main energy source for cooking, lighting and heating

Electricity has become the main source of energy used by various households in the country. It accounts for 70.0%, 51.0% and 49.0% of energy used for lighting, cooking and heating respectively.

However, for cooking, the Eastern Cape remains the only province in which more households use paraffin and wood than electricity. Of the 1.5.m households in the Province, 445 000 use paraffin, 544 000 use wood and only 420 000 use electricity for cooking. Also of the 110 000 households using animal dung for cooking in the country, 49 000 were in the Eastern Cape alone (Census in Brief, 2001). Similarly for heating, majority of the Province's source of energy is wood and paraffin, combined to provide energy source for two-thirds of the total number of households.

There is also an extensive reliance on animal dung for heating. Only in lighting does the province use electricity as the main source of energy. Even for lighting, paraffin and candles are proportionately more in use compared to all other provinces.

3.6.4 Access to telephone, toilet facilities, and refuse removal services.

In South Africa overall, 42.4% of households had access to a telephone in the dwelling (land line or a cell phone). In the Eastern Cape, the comparative figure is 29.0%, the second lowest in the country. With regard to toilet facilities, only 13.6% of all households in South Africa did not have access to toilet facilities. In the Eastern Cape however, three out of every ten households did not have access to toilet facility, the worst affected in the country. Furthermore more than half of households (55.5%) in South Africa had a refuse removal service once a week or more often, yet in the Eastern Cape only 36.4% of households have access to these services Census in Brief, 2001).

3.6.5 Households with selected household goods

Selected household goods like radio, television, refrigerator and computer, play influential roles in well being and informed living. Table 6 shows that the Eastern Cape Province had the least proportion in almost every category of these selected household goods as at 2001.

Table 6: Percentages of households in each province with selected household goods

Household goods	East Cape	Free State	Gauteng	KZN	Limp	Mpumalanga	North Cape	North West	West Cape	SA
Radio	64	75	77	73	69	74	68	70	79	73
Television	39	54	67	47	40	50	57	50	74	51
Refrigerator	32	49	62	47	39	51	57	50	74	51
Computer	4	5	16	7	2	5	7	4	18	9

Source: Compiled from Census in brief, 2001; p. 98

3.7 Conclusion: Eastern Cape Province's development issues and constraints

The socio-economic background of the Eastern Cape Province compares unfavorably with most other provinces in South Africa. It has the characteristics of a typical underdeveloped economy with myriads of development challenges. A depressed economy, lack of economic resources, rising and severe unemployment due to the inability of the formal sector to offer adequate employment, rapid urbanization and migration trends, amongst others have reinforced one another to establish the Eastern Cape Province as one of the poorest in South Africa, with widespread poverty in most dimensions. The solution to this may demand profound structural changes.

Yet another major contributory factor to the current development problems of the Eastern Cape is the relatively poor provision and access to household infrastructure and services, leading to unfavourable household life circumstances and living conditions. Where access to household infrastructure and services are inadequate, females, rather than males, may be subjected to more toil and hardships in fulfilling a number of household tasks, considered as tasks within their domain as being females.

The result is that, not only is poverty widespread and severe in the province, but it may likely be the case that poverty is gendered in the province, with women more likely to experience or affected by poverty and poverty processes than men. The Eastern Cape Province's contextual background thus provides an appropriate setting for investigating the association between gender and poverty.

CHAPTER 4. THE RESEARCH METHODOLOGY

This chapter outlines the methodological issues involved in the analysis of gender and poverty. First, it discusses the various methods by which poverty is measured, highlighting their strengths and weaknesses, and identifies the appropriate method to adopt in the present study. Second, it explains and decides on types and sources of data, the measurement tools, and the predictors to use.

4.1 Why do we measure poverty?

Policies and programs designed to reduce poverty require a clear understanding of the nature and extent of the problem as well as the economic and social characteristics of the poor. Once policies have been adopted, information is critical for evaluating their effectiveness. In specific terms therefore, measurement of poverty is needed:

- to gauge the magnitude of a country or a region's poverty problem. (How much of the population is poor? Where are they located? How poor are they in terms of incomes and some other social indicators?);
- to provide a statistical basis for analyzing the nature and characteristics of poverty and monitoring trends in its incidence; and
- to influence the design of policies and programs to address poverty problems.

Regarding this particular study, the goals are to determine the proportion of the population that is considered as poor in the study region, to analyze the nature and characteristics of poverty in relation to its gender effects, and to monitor trends in its incidence, with the aim of providing an input to influence the design of policies and programs to address the problem.

4.2 Indicators for measuring poverty.

As with the conceptualization of poverty, its measurement is accompanied with a multiplicity of measurement tools, making it difficult for a shared consensus amongst experts about how poverty ought to be measured.

To help translate different concepts of poverty into indicators for measuring it, two basic types of distinctions between indicators are made: means/ends and quantitative/qualitative. Lok-Dessallien

(2001) claims that the distinction between “means” and “ends” lies at the base of a conceptual divide regarding poverty monitoring. The former refers to indicators of inputs intended to achieve an end result (e.g. the cost of a minimum food basket) while the latter measures the ultimate outcomes (e.g. nutritional status). Poverty has traditionally been measured using “means” indicators of which the most common have been the money-metric measures. Though easy to choose and apply, one is faced with frequently using set of proxies with varying degrees of correlation to one’s definition of poverty. “End” indicators correlate more closely with the phenomena being measured but change relatively slowly over time, a drawback for monitoring short and medium term poverty.

Poverty can be viewed narrowly or broadly; the broader the view, the more encompassing it is but the harder to measure. Whether a quantitative or a qualitative approach is used depends on the extent of social contextualization. Objective perspectives on poverty involve normative judgments and easily lend themselves to aggregation and use of quantitative data, as is the case with income-based definitions (for instance income poverty, basic needs approach and the HDI approach). On the other hand, subjective perspectives on poverty that are associated with participation and experiences of the poor in their societies (such as vulnerability and risks, social exclusion, lack of voice etc) are not areas that lend themselves readily for quantification and thus rely on qualitative approaches. Qualitative indicators dominate the participatory and empowerment approaches to poverty reduction.

4.3 Approaches to poverty measurement

4.3.1 The income approach

Poverty measurement has been dominated by the *income approach*, often called the “money-metric” approach because the indicators derived (normally expenditure or consumption data) are expressed in money-metric term. This approach assumes that individuals and households are poor if their incomes or consumption falls below a certain threshold (poverty line), defined as a minimum, socially acceptable level of well being by a population group. The poverty lines are based on some threshold expenditure deemed necessary to buy a minimum or socially acceptable standard of nutrition and other necessities (World Bank, 1993). This expenditure varies between countries and is affected by local tastes and cultural norms. For instance, what is socially acceptable in India may differ from that in the U.S.A. For this reason country specific poverty lines are normally used. The incidence of poverty, termed the *headcount index*, is then calculated as the percentage of the

population whose incomes fall below that threshold, a convenient way of separating the ‘poor’ from the ‘non-poor’.

While useful as a quick indication of the scope of the poverty problem, the headcount measure is insensitive to differences between individuals in the depth and severity of their poverty. The *poverty gap index* and the distribution-sensitive *squared poverty gap index* (often called the *FGT class of measures*) are used to indicate the depth and severity of poverty respectively.

The income approach however entails some problems. Two important issues arising from the money-metric measurement approach are how to measure an individual’s well being and what level of well-being is a person considered poor. In the literature two main different approaches to measuring living standards are i) measuring an individual’s consumption of a bundle of goods and services; ii) measuring an individual’s level of nutritional intake. The generally preferred indicator of a household’s living standards is a suitably comprehensive measure of current real consumption by the household, including marketed and own production (Lipton and Ravallion, 1995).

Using per capita household expenditure however is not without problems. Household size and demographic compositions differ, as do prices and access to publicly supplied goods. Therefore the same total expenditure might leave one household poor and another comfortably well off. Furthermore, poverty lines (poverty thresholds) are set on the assumption that there exist consumptions of various goods below which survival is threatened.

The most common approach in defining a poverty line is to estimate the cost of a bundle of goods deemed to assure that basic consumption needs are met (Rowntree, 1901; Atkinson, 1975; cited in Lipton and Ravallion). What constitutes “basic needs” becomes a difficult decision. For developing countries, the food expenditure necessary to attain some recommended food energy intake, augmented by a modest allowance for non-food, is the main component of a basic needs poverty line. Problems arising in this regard are deciding on energy requirements in the context of the body’s different levels of activity and measuring the cost of normative nutritional requirements. There exist differences in affluence, tastes and activity levels. For example, poverty lines constructed by this method will tend to be higher in richer regions, where households choose to buy more expensive calories (consumption of “luxury” foods). The effect of this on a poverty profile, especially where there is mobility across groups, could create a misleading picture.

Arbitrariness in defining any poverty line is unavoidable in practice. For many policy purposes, what matters most is not the precise location of some poverty line, but rather the poverty comparison that is implied across dates and sub-groups. Comparisons need be consistent; two individuals deemed to enjoy the same standard of living should not be deemed to be at different levels of poverty, otherwise measurement might seriously misinform policy (Lipton and Ravallion 1995). Another relevant concern is whether poverty lines should be set deep or at a moderate level. A lower poverty line should normally be considered as this focuses more on the ultra poor who are the sub-set of the poor who are at serious nutritional risk (Lipton, 1983b, 1989; quoted in Ravallion et al, 1995).

Yet there is the limitation of people's reluctance to divulge information concerning spending/income patterns. Also many aspects of well being are not acquired through market transactions, especially in developing countries (May, 1997). May draws attention to the wide range of needs obtained from common property resources as well as gifts and resources that are important ingredients in people's survival. Moreover, consumption-based measures reflect inputs to well being rather than outcomes, and do not necessarily reveal improvement or deterioration in quality of life or capabilities (Lipton and Ravallion, 1997).

In sum, although the income approach exhibits the advantage of objectivity, simplicity and relative abundance of data, it is intrinsically limited, revealing nothing about access people have to the determinants of well being as well as their living conditions and living circumstances, which is the main concern of the present study. But since there is no other feasible way of separating the "poor" from the "non-poor", that meets all criteria required for good measurement, the income approach (the total household expenditure variable in the data set employed) will be used in the study for the purpose of demarcating the poor from the non-poor.

4.3.2 Basic needs and human capabilities approach to the measurement of poverty

Shortcomings of the money-metric measure has led to the search for alternatives that lay emphasis on measuring development outcomes directly by focusing on unfulfilled needs. Thus the basic needs approach takes the income approach a step further. By considering poverty as a deprivation of requirements for meeting basic human needs, it dilutes the emphasis on income and focuses on such necessities as food, shelter, schooling, health services, water and sanitation facilities, and

employment opportunities. The basic needs indicators add a wider range of dimensions to income measures in that they measure goods and services directly in terms of human welfare. The difficulties associated with basic needs indicators is that they remain objective indicators but there is no easy way of aggregating them meaningfully into in-country quantitative analysis as this study would require.

Based on Sen's entitlements and capabilities conceptualization of poverty, the human capabilities approach emphasizes people's abilities and opportunities to enjoy long healthy lives, to be literate and to participate freely in their societies. Capability poverty indicators include life expectancy, literacy rates, malnutrition etc. and these may be straight forward to measure. But those associated with participation by the poor in their society is not an area that lends itself for ready quantification. The argument in favour of capability approach is that, poverty can be characterized by capability deprivation and low income is not the only influence on capability deprivation; but there is a connection going from capability improvement to greater earning power and not only the other way around. This point to the importance of a citizenry well prepared to take advantage of economic opportunities.

Sen's entitlements and capabilities approach sees deprivation either in terms of the failure to attain certain human capabilities that are essential to a person's well being or as severe lack of entitlements (ownership rights). These are relevant notions to the present study in that nutritional status, educational attainment, and health status are important life circumstances indicators that could distinguish the poor from the non-poor; but this approach may fall short in categorizing the poor and the non-poor according to the experience of poverty, as the study demands, because such areas do not lend themselves for ready quantification.

4.3.3 Measuring human development

Because the level and quality of basic education and health services, including public goods, varies significantly across countries, most analysts recommend the inclusion of social indicators in arriving at an overall assessment of living standards. This approach is championed by the UNDP in its World Development Reports in which it uses the Human Development Index (HDI), a composite measure which supplements consumption-based poverty measure with social indicators including nutrition, life expectancy, under five mortality and school enrolment rates (World Bank, 1990). This represents a marked difference from the conventional approach in that it focuses on

well being as revealed by the social indicators. Another measure introduced by the UNDP is the Human Poverty Index (HPI), which concentrates on three aspects of human deprivation – longevity, literacy and living standard. Income may be important to the realization of these outcomes, but it is the outcomes that count.

With these measures, while information on each aspect is valuable, aggregation into a single index raises a host of serious issues. Aggregation requires the arbitrary selection of weights, a feature subject to considerable criticism in the literature (Kanbur and Squire, 1999). Secondly, the use of this composite measure approach appears to be more relevant to international comparisons of living standards, where wide inequalities exist between countries, rather than region specific studies of this nature, where intra-region disparities in social indicators might be less pronounced.

4.3.4 Participatory poverty assessment (PPA) approach to poverty measurement

Conventional measures of poverty draw heavily on statistical information contained in household surveys combined with some cut-off separating the poor from the non-poor. An alternative empirical approach to measuring poverty involves asking people what, to them, constitutes poverty. Participatory poverty assessments (PPAs), as this approach is sometimes called, are much more open-ended, interactive and qualitative and allow people to describe what constitutes poverty in whatever dimensions they choose (Kanbur and Squire, 1999).

From PPAs, individuals from various social groups assess their own poverty and existing poverty reduction strategies. Forefronts in the development of PPAs are researchers such as Jodha, Chambers, and Salmen. As a result of the findings of the World Development Report of 1990, poverty assessments began in 1993 to include participatory surveys of their own (Kanbur and Squire, 1999). As at 1998, 43 policy oriented participatory surveys had been undertaken at the World Bank. Among the important aspects of poverty that emerged from the PPAs are risks and vulnerability, lack of voice and political rights (described as powerlessness). Vulnerability involves exposure to shocks, stress and risks, as well as defenselessness (lack of means to cope). Themes emanating from how the poor themselves see poverty, from various PPAs include:

- Fewer meals a day and nutritionally inadequate diets
- Dependency and helplessness
- Non-existent or low and irregular source of cash income

- Feeling of powerlessness and inability to make oneself heard
- Lack of household assets such as utensils and land
- Inability to provide for the children and the family
- Lack of support network

Thus PPAs can enrich our understanding of the poor and lead to public actions that are perceived by the poor to be of benefit to them.

Qualitative indicators of PPAs are more enlightening in terms of information conveyed and also have the advantage of measuring well being in terms of final outcomes rather than proxies for these outcomes; but the information tends to only exist for small sample sizes, which tend to limit their usefulness from a broad policy perspective. Furthermore they cannot be easily aggregated and are expressed with varying degrees of familiarity. Some of the indicators are group measures and cannot be used to measure household or individual well being.

Regarding the present study, a profile of a whole province is being provided which necessarily demands an extensive survey with a representative sample base. PPAs are certainly not the most suitable for such type studies, as generalization, rather than specificity, are the expected outcomes.

4.4 Instruments for measuring poverty

This section addresses the question of how to assemble the data to measure poverty. Instruments applied depend to a large extent on the nature of the investigation: is it quantitative or qualitative? Three measurement instruments readily discernible are the survey strategy, suitable for quantitative studies; the PPA instrument, for qualitative investigations; and the multiple techniques and triangulation strategy, some combination of the survey and the PPA instruments.

4.4.1 The survey instrument

Quantitative data for measuring and monitoring the socioeconomic aspects of poverty are collected in various ways. At one end of the spectrum are population censuses. At the other end are ad hoc surveys like community surveys, institutional records, stand-alone surveys on various topics stitched together. In between are household surveys. Household surveys such as the OHS or the LSMS surveys, offer a systematic approach to collecting data with greater frequency and less

coverage than censuses. The different approaches have their own strengths and weaknesses but when used together, provide complementary information.

Census and Household surveys

Secondary analysis of poverty depends extensively on official statistics normally obtained from a country's national census data and household and sector specific surveys. Censuses and household surveys differ in scale and coverage. The censuses provide the most complete coverage of the population. But the scale of the exercise may limit a census to collection of a few demographic and socioeconomic variables. In addition, there are often time lags between the conduct of the censuses and the time the results are known. Censuses are therefore not appropriate as monitoring tools, but provide a frame from which smaller samples can be drawn for different household surveys.

Household surveys cover a broad range of inquiries and may use large samples or small. One of the most powerful features of household surveys is that they can use probability samples. These allow accurate estimates of the proportion of the total population having the characteristic being measured. Nevertheless, unless the sample size is large, estimates for small area or small subgroups of the population cannot be generated without substantive margins of error.

Community Surveys, Institutional Records and ad hoc Case Studies

These include stand-alone surveys designed to collect information on the institutions, socioeconomic infrastructure, and the community services within which different household groups may be living. Examples of these are:

- institutional records such as health center records compiled by the department of health, or school records maintained by the department of education;
- information on available community services and infrastructure, community-level prices, wage rates, etc. that may help to understand the environmental or community constraints that may influence poverty levels;
- small surveys using non-probability samples, and case studies, approaches which can provide a depth of understanding of the issues associated with poverty that the more formal and statistically valid approaches may not;
- information pieced together from projects, academics, NGOs, UN agency, and other sources.

However, such an approach does not provide a systematic basis for monitoring poverty over a long period.

Indeed, surveys are often associated with government-driven research, the survey being the primary strategy to collect information for government programs. As a research strategy the survey has advantages and disadvantages. Surveys produce valuable empirical data with a broad coverage. On the other hand, in an attempt to achieve broad coverage, surveys often produce superficial information. Validity and reliability of survey responses can be compromised as accuracy and honesty of responses can be questioned (Denscombe, 1998). Furthermore the applicability of survey instrument in different contexts is contentious more so because language does not always translate to the same meaning (Babbie and Mouton, 2001).

4.4.2 The participatory poverty assessments (PPA) instrument

Qualitative analysis of poverty is associated with PPAs. The PPA methodology places a great emphasis on local people acting as analysts rather than informants, while outsiders serve merely as facilitators. Group interviews are also much in use as stated by Chambers (1994): "... Instead of interviewing individuals, group contexts are used, with visual sharing of information for ensuring that weaker or marginal members of the community are empowered to communicate". In PPAs, people describe and analyze the type, level and degree of poverty that exists in their communities. The views and perceptions so gleaned, assists researchers in obtaining a more thorough understanding of the poverty situation in the particular community.

There are a number of problems identified with the PPA instrument. Field researchers may encounter the problem of translations from local languages that they do not speak. This can result in the loss of important information, or nuances in the views offered by the community. Minority views may not be represented, as dominant views may be interpreted as universally accepted within a community. All these issues can mask the true poverty situation within the communities and households. Furthermore, the approach may be difficult to undertake in urban settings due to the heterogeneity and business mindedness of urban dwellers (the Lesotho example, in May, 1997).

4.4.3 Multiple techniques and triangulation

Many researchers currently draw on a mix of primary and secondary data to combine quantitative and qualitative methodologies. The results of these multiple techniques are normally compared and triangulated in an attempt to corroborate or refute findings obtained with the use of particular research instruments. May (2002), draws attention to the use of this technique in Grenada, Latvia and the Gambia with varying degrees of success. He concludes that analyzing and integrating the results of different techniques is difficult and can lead to contradictory results rather than providing supporting information from different sources.

4.5 Which measurement approach?

Do different measurement concepts matter, we may ask. Emanating from the literature reviewed, measurement method matters because the concept used in defining poverty determines the measurement method to adopt and subsequently the reduction strategy to put in place. However there are signs of an emerging consensus on poverty measurement that might fruitfully guide future efforts at evaluation. Recent theory and practice has moved away from the earlier obsession with a single measure – the count of how many people do not reach some arbitrarily poverty line (Ravallion et al, 1997). The multidimensional nature and interdependent relationships among the various indicators of poverty suggest the need for a careful consideration of a suitable blend of measurement approaches and reduction policies and programs.

Ravallion (1997) contends that while different methods of defining and measuring poverty will inevitably identify different groups as poor, the evidence suggests that the differences may not be that great. What seems to matter most is the strategy that is derived. According to Ravallion, if the focus is confined to income, the key interaction will be efforts to increase income by way social grants, employment programs, economic growth and changes in inequality. As the definition expands to include social basic needs, the key interaction becomes that between efforts to increase income and the improvement of social dimensions of well being. And as the definition is further expanded to embrace risk, vulnerability and voice, then safety nets, access to credit and participation would emerge as crucial to the poor's ability to take advantage of risky poverty reduction opportunities.

In this particular investigation, the focus is on poverty as it affects women. The definition surrounds hardships experienced by poor women in their living conditions and living circumstances, like difficulties encountered in fetching water, fetching wood and dung for energy, types of dwellings in which they live, access to paid employment, to health, education and the likes. The key interaction under such a situation would be the expansion of social infrastructure and programs directed at women empowerment.

4.6 Types and sources of data sets.

For informed decision-making on reducing gender inequalities in poverty, and for monitoring poverty when policies are implemented, reliable and valid methods of measuring are essential.

The earlier section of this chapter examined four different approaches in which poverty can be measured and also examined the various measurement tools (the survey method and the PPA method). Taking into consideration the objectives of the study, the most convenient, reliable and consistent measurement instrument to use to generate information as well as to monitor these indicators is the survey approach. The present study therefore is a secondary analysis of gender-poverty linkages, based on data sets obtained from national surveys and censuses conducted after the apartheid era.

Earlier socio-economic surveys in South Africa have not been brought into contention because survey-based research in South Africa under apartheid was to a great extent unreliable due to political influences. Demographic data were used largely to reinforce the ideological position to protect the economic advantage of the white population (Mfono, 2001). Under the Group Areas Act, for instance, many Africans in particular were unwilling to provide information because of rigorous controls that regulated their presence in urban areas (Mfono, 2001). The creation of new provincial boundaries, the inclusion of former independent homelands, and the establishment of a common population register in the post apartheid South Africa implies earlier survey data sets are meaningless in the present context.

Relevant measurement instruments and resources available after apartheid include:

- The 1996 and the 2001 censuses (including the 2001 10% census)
- The yearly October Household Surveys (OHS) - 1995 to 1999
- The yearly Labour Force Surveys (LFS) - starting 2000

- The General Household Surveys (GHS) - starting 2002 (replacing the OHSs)
- The Income and Expenditure Surveys

4.6.1 Choice of data sets.

After a careful evaluation of the above resources, the General Household Survey (GHS) 2002, conducted by Statistics South Africa, is chosen as the main data set to employ for the analysis. The GHS (including the OHS) is chosen in preference to the IES because while both have sufficient information on household income and expenditure along gender, race and provincial lines, the former provides a far greater coverage of social indicators, including access to social infrastructure, which is extremely relevant in assessing living conditions and life circumstances by gender, the main focus of this study. Similarly, the bi-annually conducted LFS covers only some limited areas of the households, being a specialized survey designed to measure the dynamics in the labour market. The limitations of censuses vis-à-vis household surveys have already been mentioned (in section 4.4.1).

Statistics South Africa used to conduct the OHS annually from 1994 to 1999. This was discontinued in 1999 (due to financial constraints) but resumed in 2002 as GHS. The 2002 version is chosen because it includes some additions to the usual coverage of the previous OHSs, which it replaced, apart from being a more recent document. The data set is based on probability sample of 30 000 households.

4.6.2 Method of data analysis

The purpose is to conduct an analysis of poor households in the Eastern Cape Province to measure a range of indicators to find out the association between gender and poverty experiences. This implies disaggregating national data according to province and creating the data set for Eastern Cape Province as a first step. This is achieved by converting the GHS ASCII data to SPSS format. Relevant files created include the House file, the Worker file, and the Person file.

Since the focus of the studies is on poor households, the primary analysis concerns the demarcation between the 'poor' and 'non-poor' households in the Province according to the gender of the household head. Total monthly household expenditure is used as the variable to separate the 'poor' households from the 'non-poor'. The monthly household expenditure categories are recoded (1 =

poor; 2 = non-poor) using a cut-off point of R800. (The household poverty line is based on consumption expenditure at R800 or less per month at 2002 prices). Cross tabulations are used in establishing any associations between income poverty and gender of households by population groups and area of residence (rural/urban).

The next stage involves the selection for analysis, relevant variables that relate to hardships in living conditions and life circumstances of households and how these are associated with gender status. The following are the indicators chosen for analysis, largely based on Statistics SA development indices namely the *Household infrastructure index* and the *Household circumstances index*:

- Access to housing (formal, traditional, shacks)
- Access to energy for cooking, for lighting, and for heating
- Source of water
- Sanitation (toilet facilities)
- Refuse removal
- Communications (access to telephone)
- Level of education of head of household
- Employment status of head of household

The 2002 GHS survey is cross-sectional in nature, giving a snapshot picture at the given point in time. It is however important to show the dynamics in the experience of poverty in the province. To this end, the 1997 OHS data set is similarly analysed, and the findings compared with the situation as at 2002. The 1997 OHS dataset is chosen in preference to the 1998 and 1999 because in relative terms, the five-year period, 1997 to 2002, offers a suitable range for a medium term trend analysis. Secondly, the 1997 survey was based on a probability sample of the same number of households, 30 000 households, as the 2002 GHS, whereas the 1998 OHS was based on a smaller sample of 20 000 households.

Total household expenditure is chosen as the variable that determines the poor from the non-poor. This variable, which was presented in a number of bands, have been recoded into only two categories of “poor” and “non-poor”. For the 2002 GHS data set, households with monthly expenditure less than R800 were considered “poor” while those with monthly expenditure of R800 and above were considered “non-poor”. Since the same R800 cut-off cannot be applied to the 1997

data set because of the effect of inflation, the Consumer Price Index (CPI: PO141.1; Statistics SA) was used to arrive at a cut-off expenditure amount of R586 per month for the 1997 OHS data set.

The main limitation of the use of expenditure (instead of income) measure is that expenditure measure is likely to create gender bias – understating expenditure of male-headed households in comparison with female-headed households; since women are responsible for consumption, they report more.

CHAPTER 5. ANALYSIS AND INTERPRETATIONS

5.0 Categories of Analysis

Analysis is done in three categories:

- Distribution of poor and non-poor households in the Eastern Cape Province by sex, residence (urban or rural), and population group of the head of the household
- Life circumstances of poor households: Sex by level of education, occupation and employment status
- Living conditions of the poor households: Source of water, source of energy, refuse removal type of dwelling, telephones etc.

All tables in the analysis are own created from frequency and cross tabulation analysis undertaken on the data sets employed (1997 OHS and 2002 GHS). Sources are therefore not indicated beneath the tables presented. Indicators selected for cross tabulation were statistically tested for significance using the Chi Squared significant test. In each case, strong significance was established between variables as shown in the attached Appendix 2

5.1 Distribution of poor and non-poor households in Eastern Cape

As at 2002, there were 1.61 million households in the Eastern Cape Province, excluding institutions such as tourist hotels, prisons, boarding schools and homes for the aged. As already noted, for the purposes of this study, households with total expenditure of less than R800 per month in 2002 were regarded as poor, whereas those with monthly expenditure less than R586 were considered the poor households in 1997.

Table 7 below shows that, overall, 76.6% of the households in the Eastern Cape were poor while only 23.4% were non-poor as at 2002. This situation compares unfavourably with that of 5 years previously, when 61.9% of all households were poor. Between 1997 and 2002 therefore, Headcount Poverty has increased in the province.

**Table 7: Percentage of poor and non-poor households in Eastern Cape
1997 compared with 2002**

	1997	2002
Households	%	%
Poor households	61.9	76.6
Non-poor households	39.1	23.4
Valid sample size	3 948	3 597

Note: From the analysis, a large increase in the Headcount poverty for the period is noticed. The possible influence of the CPI deflator applied to accommodate the effect of inflation was investigated. Frequencies were re-run for the 1997 data set using different thresholds to demarcate the “poor” from the “non-poor”. Results obtained (attached as Appendix 1) are summarised as follows:

- R586 as threshold produced 61.9% poor households (actual threshold used in the analysis);
- R650 as threshold produced 68.5% poor households;
- R700 as threshold produced 68.8% poor households.

Judging from the above summary, it can be deduced that Headcount poverty had actually increased in the Eastern Cape Province over the period 1997 to 2002, a situation which may have nothing to do with the degree of adjustment for the effects of inflation.

5.1.1 Distribution of poor and non-poor households by sex of the household head

Table 8 shows that as at 2002, 85.4% of all female-headed households (FHHs) were poor while in the case of male-headed households (MHHs) only 68.6% were poor. This situation has been deterioration on that of 1997 where 67.9% and 50.8% respectively of female-headed households and male-headed households were poor.

Table 8: Distribution of poor and non-poor households by sex of the hh head

		1997			2002		
		Sex of hh head			Sex of hh head		
		Male	Female	Total	Male	Female	Total
Poor	% within sex of head	50.8	67.9	59.9	68.6	85.4	76.6
Non-poor	% within sex of head	49.2	32.1	40.1	31.4	14.6	23.4
	% of total	46.6	53.4	100	52.2	47.8	100

In sum, although a greater percentage of FHHs in the Eastern Cape were poorer than the MHHs as at both 1997 and 2002, at the same time, an increasing proportion of MHHs (35.0%) compared with FHHs (26.0%) had moved into poverty between the period 1997 and 2002.

5.1.2 Poor households by area type (urban or non-urban)

AS at 2002, 87.0% of all non-urban households in the Province were poor, while only 59.0% of urban households were poor, as shown in Table 9. The situation was similar to that of 1997 where 70.0% of non-urban households were poor compared with only 43.5% of urban households. Calculations based on the table reveals that the number of poor urban households increased by 36.0% while the number of non-urban households increased by 24.0%. It can therefore be inferred that while poverty was associated with rural areas of the province, a greater percentage of urban households were moving into poverty between 1997 and 2002.

Table 9: Distribution of poor households by area type, Eastern Cape

		1997			2002		
		Area type			Area type		
		Urban	Non-urb	Total	Urban	Non-urb	Total
Poor	% within area type	43.5	70.2	59.9	59.1	87.0	76.6
Non-oor	% within area type	56.5	29.8	40.1	40.9	13.0	23.4
	% of total	38.6	61.4	100	37.2	62.8	100

5.1.3 Poor and non-poor households by sex and area type

Table 10 shows the distribution of poor and non-poor house holds by sex and area type as at 2002.

Table 10: Distribution of poor and non-poor households by sex and area type, 2002

			Sex of hh head		
			Male	Female	Total
E. Cape urban	Poor	% within sex of head	49.3	71.9	59.0
	Non-poor	% within sex of head	50.7	28.1	41.0
E. Cape non-urban	Poor	% within sex of head	81.3	92.3	87.0
	Non-poor	% within sex of head	18.3	7.7	13.0
		% of total	49.5	50.5	100

In urban areas of the Eastern Cape, 71.9% of all FHHs were poor compared with 49.3% of the MHHs as at 2002. In the rural areas of the province, an extremely large 92.3% of all FHHs compared with 81.7% of MHHs were poor. Thus, whether in urban or non-urban area, female-headed households were poorer than male-headed households.

5.1.4 Poor households by population group.

Table 11 below shows the distribution of poor and non-poor households in the Eastern Cape according to the population group of the head of the household.

Table 11: Poor and non-poor households by population group of the head of the household.

		1997					2002				
		Afric	Col	Ind	Whit	Tot	Afric	Col	Ind	Whit	Tot
Poor	% within race of hh	65.7	33.2	0.0	13.9	59.9	83.0	69.6	3.6	4.1	76.6
Non-poor	% within race of hh	34.3	66.8	100	86.1	40.1	17.7	30.4	96.4	95.9	23.4
	% of total	86.4	6.6	0.4	6.6	100	86.3	6.3	0.3	6.7	100

From the table, 83.0% of all households headed by Black Africans were poor as at 2002, compared with households headed by Coloureds, Indians and Whites, where 69.0%, 3.6%, and 4.1% respectively were poor. The 2002 situation was a deterioration over the 1997 situation where only about two in three (65.7%) Africans and one in three (34.3%) Coloureds were poor, showing an increase in the proportion of African and Coloured households moving into poverty between 1997 and 2002.

From the analysis provided so far, it is clear that, in the Eastern Cape, households headed by females are often poorer than the male-headed ones; households headed by African females and situated in rural areas are most likely to experience or to be affected by poverty than any other category; and that poverty appears to have increased.

5.2 Gender and living conditions of the poor in the Eastern Cape

Poor living conditions were characteristic of a large number of households in the Eastern Cape. The experience of poverty correlates with access to housing, infrastructure or services. This section of the analysis therefore looks at the availability of, and access to, these infrastructure and services. From a gender perspective, the focus of the analysis is on the hardships experienced from the lack of, or adequate access to, these services. Are women more likely to be affected than men under such living conditions?

5.2.1 Access to water and source of water

Main sources of water available to households in the Eastern Cape are piped taps in the dwelling or yard, public taps outside the dwelling, and flowing water/streams and springs. Table 12 shows that, as at 2002, 40.5% of all households had piped water either in the dwelling, on site or a neighbour’s tap. The greater majority, 59.5% had to walk and fetch water from outside public taps, streams and springs, sometimes involving great distances. The table further shows some disparity between female-headed households and male-headed households in access to water. A greater percentage of households headed by females (66.1%) obtain water from outside sources involving long walking distances compared with 53.7% of male-headed households as at 2002.

Table 12: Access to water and source of water in Eastern Cape

		1997			2002		
		Sex of hh head			Sex of hh head		
		Male	Female	Total	Male	Female	Total
Pipe in dwelling or yard	% within sex of hhh	47.0	27.3	37.5	46.6	33.9	40.5
Public tap, stream, Spring, outside dwel	% within sex of hhh	53.0	72.7	62.5	53.1	66.1	59.5

The situation as at 2002 shows an improvement over that of 1997 where 62.3% of households overall had to get water from outside sources; while at the same time there was a greater disparity, 73.0% and 53.0% respectively between FHHs and MHHs in this category.

The disparity between FHHs and MHHs in itself has gender implications. But the more relevant implication of accessing water from outside sources is that women, more likely than men, undertake such tasks. Women are therefore more prone to experience hardships entailed in sourcing water for the household than men.

5.1.5 Source of energy.

In general, 55.8% of all households in the Eastern Cape had main electricity supply as at 2002 compared with 48.7% as at 1997. Electricity is used mainly for lighting. Households without electricity supply, found mostly in rural areas, use paraffin and candles for lighting, easily obtainable from local shops. Sourcing energy for cooking and heating however entails some toil and hardships. Table 13 shows that wood constitute the greatest type of energy used by households for cooking, accounting for 38.4% of total energy source as at 2002 compared with 40.0% in 1997.

Table 13: Source of energy for cooking

		1997			2002		
		Sex of hh head			Sex of hh head		
		Male	Female	Total	Male	Female	Total
Electricity	% within sex of hhh	32.7	16.4	23.8	32.0	22.8	27.6
Wood	% within sex of hhh	34.5	44.6	40.0	34.9	40.7	38.4
Paraffin	% within sex of hhh	26.7	31.9	29.5	29.2	30.1	29.7
Gas	% within sex of hhh	2.4	3.2	2.7	2.7	3.43	

Table 14: Source of energy for heating

		1997 Sex of head of household			2002 Sex of head of household		
		Male	Female	Total	Male	Female	Total
Electricity	% within sex of hhh	32.7	16.4	23.8	25.2	16.3	2.1
Wood	% within sex of hhh	34.5	44.6	40.0	44.4	50.2	47.1
Paraffin	% within sex of hhh	26.7	31.9	29.5	23.7	28.3	25.9

In a similar vein the main source of energy for heating was wood, constituting almost one-half of total energy used in heating as at 2002 compared to 40.0% as at 1997 as shown in Table 14. Fetching of wood is a laborious task, involving long distances in search of wood. Women normally undertake the task of wood fetching, just like water sourcing.

In sum, as at both 1997 and 2002, it was always the case that a greater proportion of female-headed households rely on wood for cooking and heating than male-headed households. In addition, irrespective of the sex of the household head, it is normally women who undertake the fetching of wood and therefore are more likely to face the toil and hardship entailed in undertaking the task of sourcing energy for household use.

5.1.6 Access to other services

A number of other services, though not directly associated with hardship, affect the level of well being in households. These include type of dwelling, refuse removal, toilet facility, and telephone in dwelling. Well-being is associated with decent housing of the formal type, with flush toilets, regular refuse removal and telephone in the dwelling.

Table 15: Type of dwelling by the sex of the head of hh, 1997 and 2002 compared

		1997 Sex of head of hh			2002 Sex of head of hh		
Dwelling type		Male	Female	Total	Male	Female	Total
Formal brick dwell.	% within sex of hhh	56.2	45.2	50.5	46.3	36.3	41.5
Traditional dwell.	% within sex of hhh	28.7	41.7	35.5	30.4	41.4	35.5
Informal dwel/shack	% within sex of hhh	8.1	6.0	7.0	11.2	6.6	9.1

According to Table 15, formal brick stands (42%), traditional dwellings (36%) and informal dwelling/shacks (9%) constitute the main types of dwelling in the Eastern Cape as at 2002. The comparative figures as at 1997 were 51%, 36% and 7% respectively. This shows a relative decrease in the proportion of formal dwellings between the two periods. A further breakdown reveals that female-headed households were over represented in the traditional dwelling type category, with 41% of all FHHs being traditional types compared with 30% for MHHs as at 2002. The situation as at 1997 was quite similar to that of 2002.

Table 16: Type of dwelling by area type, 1997 and 2002 compared

		1997 Area type			2002 Area type		
Dwel type		Urban	Non-urb	Total	Urban	Non-urb	Total
Formal brick dwel	% within stratum	68.5	39.2	49.5	65.1	27.1	41.5
Traditional dwel	% within stratum	2.2	57.0	37.7	2.1	56.0	35.5
Informal dwel/shack	% within stratum	14.3	1.7	6.1	14.2	3.3	8.8

Table 16 shows that, as at both 1997 and 2002, more than one-half (57.0% and 56.0% respectively) of all non-urban dwellings in the Eastern Cape were of the traditional type, whereas only about one in every 50 dwellings in urban areas were of the traditional type in both years.

Since traditional type dwellings were less likely to have access to telephones in the dwelling, flush toilets and regular municipal refuse removals, the level of well being is therefore most likely to be lowest among those living in traditional dwellings, mostly in non-urban areas and in female headed households. Greater proportions of women constitute this category than men and hence do without the comforts of good and satisfied living. The lack of access to decent toilet facilities, telephones in dwelling and refuse removals are characteristics of poor living conditions.

5.2 Gender and life circumstances of the poor in the Eastern Cape

From households, we now turn to individuals and their life circumstances and how they are affected by poverty. Analysis presented here refer specifically to access to opportunities assisting in escaping the ravages of poverty such as education and employment.

5.3.1 Head of household by education level

In general, education correlates with poverty in that education enhances capabilities and creates opportunities, which could lead to an escape from poverty. Table 17 shows that almost one in every five household heads (18.6%) in Eastern Cape had no schooling as at 2002, an improvement on the situation as at 1997 when about one in every four household heads (24.0%) had no schooling. Among those with no schooling there was a greater representation of female heads of households than male heads as at both years. Also, at higher levels of education, Grade 12 and above, female household heads were proportionally less represented than male household heads.

Table 17: Education level of head by sex, 1997 and 2002 compared

		1997			2002		
		Sex of head of hh			Sex of head of hh		
Educ. level		Male	Female	Total	Male	Female	Total
No schooling	% within sex of head	21.0	26.7	24.0	15.0	22.7	18.6
Some school.	% within sex of head	57.4	63.5	60.0	62.3	65.3	63.8
Obtain Grade 12	% within sex of head	12.0	6.1	8.1	10.7	5.8	8.3
Tertiary	% within sex of head	9.6	3.7	6.6	12.0	6.2	9.1

The lower educational attainment of female heads implies that they are more likely to be less armed to take up highly skilled and well paid work opportunities. This limits their capacities and capabilities to escape from the hardships of poverty as they tend to take any available low pay jobs.

5.2.2 Employment and occupation

The lack of employment is a major characteristic of the poor. Table 18 shows that 43.7% of all households in the Eastern Cape had no worker in the household as at 2002 while 53.2 % had one or two workers in the household. This is an improvement over the 1997 situation where 62.0% of all households had no worker in the household while about 36.5% had one or two workers in the household

Table 18: Proportion of households without workers in household

		1997			2002		
		Sex of head of hh			Sex of head of hh		
Number of workers in household		Male	Female	Total	Male	Female	Total
No worker in hh	% within sex of head	47.7	74.7	61.8	34.4	54.2	43.8
1 or 2 workers in hh	% within sex of head	49.4	24.7	36.5	61.6	33.9	53.2

Of households with no worker, FHHs were over represented. As at 2002, 54% of FHHs compared with 34.4% of MHHs had no worker in the household. In 1997, the disparity was greater as 74.7% of FHHs compared with 47.7% of MHHs had no worker in the household. Having no worker in the household implies lack of income from employment and hence a higher risk of entering or remaining in poverty. Female headed households are more likely than male headed households to be at risk of poverty arising from the lack of employment opportunities.

Table 19: Employment status of household head, 1997 and 2002

		1997			2002		
		Sex of head of hh			Sex of head of hh		
Employment status		Male	Female	Total	Male	Female	Total
No employment	% within sex of head	57.8	83.8	71.1	45.7	63.3	54.0
Employed	% within sex of head	42.2	16.2	28.9	54.3	36.7	46

In terms of employment status of the household head, Table 19 shows that 54% (more than one-

half) of all household heads had no employment as at 2002, an improvement on the 71.6% as at 1997. A breakdown by the sex of the head shows that 63.3 % of all female household heads had no occupation compared with 45.7% of male household heads as at 2002, corresponding to a similar pattern in 1997 where 83.0% of all female household heads compared with 58.0% of male household heads had no employment. The situation as at 2002 reflects an improvement over that of 1997.

Table 20: Occupation type by sex of head of household, 1997 and 2002

		1997			2002		
		Sex of head of hh			Sex of head of hh		
Occupation		Male	Fem.	Total	Male	Fem.	Total
No occupation	% within sex of head	58.6	83.3	71.6	45.7	63.3	54.0
Managerial/ professional	% within sex of head	7.7	3.1	5.2	6.9	0.9	3.6
Semi skilled/ Clerk/operators	% within sex of head	24.4	5.4	15.0	35.5	17.4	26.8
Elementary routine	% within sex of head	8.0	2.9	5.3	12.4	8.0	10.4
Domestic worker	% within sex of head	1.3	5.3	3.4	0.4	10.4	5.1

Table 20 shows that while a large proportion of household heads were not employed in any occupation, among those employed, a greater proportion were in the semi-skilled/clerks/operators and elementary routine occupation categories as at both 1997 and 2002. Employed female heads of households were fewer in all other categories except the domestic worker category where they were over represented.

In sum, the life circumstances of the greater proportion of the people in the Eastern Cape has been characterised by low and unskilled education levels as well as very low levels of employment. Female household heads rather than their male counterparts, and female-headed households rather than male-headed one were the worst affected in this regard.

5.4 Conclusion

In the chapter, an analysis has been undertaken on the gendered characteristics of poverty in the Eastern Cape Province using selected indicators considered relevant for the purpose. Analysis has focused on three main dimensions: i. the magnitude and incidence of income poverty in the region; ii. living conditions of the poor in terms of access to infrastructure and services; and iii. life circumstances of the poor in terms of education, employment status, and occupation. While the main emphasis of the analysis was on the gender aspects of the above mentioned dimensions, a great deal of attention was also given to location (urban/rural) and race aspects.

Overall, the analysis revealed that, income poverty appeared to have increased in the province between 1997 and 2002. Female headed households appeared to be more affected than male headed households in both years, with a greater proportion of female headed households moving into poverty between the periods. Furthermore, income poverty appears to be more prevalent in non-urban areas relative to urban areas, and the African population group is the most affected amongst all the population groups.

In a similar vein, female headed households rather than male headed ones appeared to lack adequate access to household infrastructure and services during both periods. The lack of these is associated with poverty since alternatives have to be sourced, often involving much toil and hardship. It is women who normally undertake such tasks and therefore are at more risk of experiencing the associated poverty. A positive side however is the improvement in living conditions between 1997 and 2002, resulting in declines in the levels of poverty associated with inadequate access to infrastructure and services in the province.

An interesting revelation is the finding on the life circumstances dimension. Not only had there been improvement in the proportion of the number of workers in the households between 1997 and 2002, but the proportion of household heads employed increased (from 29% to 37%) between 1997 and 2002. Relating this to income poverty implies that income poverty in the Province should show a tendency of declining rather than increasing, as was the case. Contradictory though as this might appear, a closer look at the analysis on the 'Occupation type by sex of the household head' (refer table 20) reveals that the improvements achieved in employment were very moderate and occurred mostly in the low-pay employment categories of clerks, operators, elementary routine, and domestic workers. Additional income from this source might not be sufficient enough to make a

significant contribution to household expenditure. Nonetheless, life circumstances in the Province has been characterised by low and unskilled education levels as well as low levels of employment in low-pay jobs; these being essential characteristics of poverty, and appear to affect females more than males.

In sum, the analysis has established that poverty in the Eastern Cape Province is gendered, with women more likely to be affected despite efforts over the years to stem the inequality in gender and the experience of poverty.

CHAPTER 6: CONCLUSION AND REMARKS

6.1 Conclusion

This study is based on the situation regarding poverty in the Eastern Cape Province of South Africa, with a particular focus on the gender implications of poverty and poverty processes. The research question the study has addressed is whether men and women are affected differently by poverty and whether there have been improvement in gender disparities over the years. Findings could inform gender positive poverty alleviation policies. The study has demonstrated that gender disparities continue to exist in the experience of poverty, with women more likely than men being affected. Indeed, in the specific case of the Eastern Cape Province, not only is poverty gendered but poverty appears to increase despite efforts towards its alleviation over the years.

The literature on gender and poverty abounds with concerns in the development arena about the unequal distribution of poverty along gender lines, leading to such statements and axioms like ‘Feminisation of poverty’; ‘Poverty has a woman’s face’; ‘Gender empowerment’ and the likes. Often these statements, convincing as they might be, have not been subjected to empirical study. While it may be tempting to make such generalization on the question of gender and poverty, these generalizations may be dangerous since the extent of inequality may differ between countries or even between regions of the same country. The need for region specific study therefore prompted the drive to undertake the study on the Eastern Cape, a region that faces special development needs, different from those of other regions in South Africa.

The study is a quantitative analysis, using relevant official data from household surveys conducted by Statistics South Africa. Analysis focused on three main dimensions:

- i. the magnitude and incidence of income poverty in the region;
- ii. living conditions of the poor in terms of access to infrastructure and services;
- iii. life circumstances of the poor in terms of education, employment status, and occupation.

While the main emphasis of the analysis was on the gender aspects of the above mentioned dimensions, a great deal of attention was also given to location (urban/rural) and race aspects. The main findings of the study are summarized as follows:

Characteristics of the Eastern Cape Economy

Contextually, the Eastern Cape is among the most depressed regions in South Africa with myriads of development needs and constraints, including unemployment, widespread poverty, large-scale male out-migration and lack of infrastructure and services in predominantly large non-urban areas (especially the former Ciskei and Transkei).

Extent of income poverty

Overall, income poverty appeared to have increased in the province between 1997 and 2002 from 61.9% to 76.6%. As at both 1997 and 2002 greater percentage of households headed by females were poorer than male-headed households, although an increasing proportion of male-headed households had moved into poverty between 1997 and 2002 than female-headed households.

In the province, poor households were over represented in non-urban areas with female-headed households constituting the majority. Poverty was most marked among the African population group and in female-headed households in particular. The implication is that African females, especially those living in rural areas, were most likely to be among the poorest of the poor.

Gender, living conditions, and poverty

The study acknowledges that access to infrastructure and services like clean water, energy, toilet facilities, dwelling type, telephones and refuse removal correlate with the experience of poverty, and empirically established that households in the Eastern Cape severely lacked adequate access to these.

For instance, most African households had to fetch water and wood from sources outside the dwelling often involving long distances. These are laborious tasks entailing hardships. Females, more likely than males, undertake such tasks. Females are therefore more at risk to experience hardships and poverty than men in the Eastern Cape.

The study also established that it is in the non-urban areas mainly, and in female-headed households compared with male-headed households, that the lack of access to these services is pronounced. This is a clear pointer that women, more likely than men, experience the consequences of poor living conditions.

Gender, life circumstances, and poverty

Strongly associated with poverty is the level of education and employment status in various households. Education and employment create capabilities and access to opportunities that assist in escaping poverty. The study established that life circumstances among households in the Eastern Cape are characterised by low education and employment levels. As at both 1997 and 2002 more than one-half of household heads had no occupation. In the case of all members of the household, 43.8% of households had no worker in the household as at 2002 (an improvement over the 1997 situation where 61.8% of households had no worker in the household). For both years, female-headed households were over represented in the no worker household category. Of those working, the majority were found in the low-skilled and low-pay categories of employment. Women in particular were fewer in all occupation categories except domestic work, and concentrated in the low-skilled jobs. Women therefore, more likely than men, find it extremely difficult to escape the ravages of poverty.

In sum, the study has provided sufficient evidence that gender affects poverty and that females are more likely to be affected by poverty than men. Further, the study has also demonstrated that, in the specific case of the Eastern Cape Province, it is the African population group in the non-urban areas of the province that were most likely to be affected by poverty and poverty processes. Finally, the study has established that there has not been any improvement in this situation between 1997 and 2002.

6.2 Remarks

The analysis undertaken relied heavily on the association between female headship and poverty. The use of household headship data in analysing gender inequality in poverty might not be the best means of revealing gender disparities because it fails to include variables that have to do with intra-household relations. The unavailability of intra-household gender disaggregated data necessitated the resort to household headship data as proxy.

From the literature, a strong reason for gender inequality has been the unequal social relations between men and women, skewed in favour of men, where men and women are assigned different roles based on gender. Of importance also is the unequal access to economic and social resources between men and women. Gendered division of labour in the household ascribes domestic duties and reproductive roles to the woman. Sourcing of water, wood and dung from distances with toil, for example, falls in the woman's domain. Similarly, since access to resources is skewed in favour of men, women's capabilities and capacities to escape poverty are compromised. The extent of gender disparity in poverty then ought to be determined in the domain of intra-household relations. The research challenge then is the need to generate sufficient and reliable data on gender relations within the household.

Empirically, the study has demonstrated that among poor households in the Eastern Cape Province, households headed by females were over-represented relative to households headed by males. From this evidence, it cannot be concluded with certainty that female headed households were generally poorer than male headed households; neither can this evidence be taken wholly to support the view that females are more affected by poverty than males. Within particular households, whether female headed or male headed, gender disparities in poverty may exist. Even in non-poor households gender disparities and inequalities may exist. Thus, though we may associate female headship with poverty, one needs some caution in drawing generalised conclusions since not all female headed households are poor and not all poor households are female headed.

An important issue that also warrants comment is the tendency to always associate gender inequality with conditions affecting women. Most gender-sensitive poverty alleviation policies target women. Currently there is an increasing awareness of male poverty in many communities, embodying far reaching implications, which the literature is relatively silent on. Research in this direction, men and poverty, might add new dimensions to the development field.


Regarding the Eastern Cape specifically, two other indicators have to be considered in conjunction with gender. The population group and area of location of households have appeared in the study as strongly correlating with the experience of poverty. Gender empowerment programs should then go hand in hand with integrated rural development, including the provision of social infrastructure and services that will have the effect of improving living conditions and life circumstances in the non-urban areas. Furthermore poverty alleviation in the Eastern Cape warrants special measures aimed


at the African population group, which the study establishes to be the most deprived group. Since the majority of this group also live in non-urban areas, strategies should concentrate on sustainable livelihood programs.


Based on the above exposition, a viable solution to the problem of gender disparity in poverty should necessarily entail a two-front attack: strategies aimed at improving the gendered nature of social relations between men and women in the household as well as other institution sites; and strategies that will eliminate inequalities in access to economic and social resources (gender empowerment initiatives and specific gender sensitive programs). The latter may call for radical changes including men having to undertake or share in reproductive tasks like care for children and the elderly, cooking, washing, sourcing water and fuel as well as other domestic tasks.

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Appendix 1: Chi-Square test on variables

Table	Chi Square value	Asymptotic. significance	Remark
Table 10	10 504.39	0.00	Strong significance
Table 12	32 496.80	0.00	Strong significance
Table 13	24 165.80	0.00	Strong significance
Table 14	28 218.53	0.00	Strong significance
Table 15	43 958.55	0.00	Strong significance
Table 16	598 813.60	0.00	Very strong significance
Table 17	57 578.07	0.00	Strong significance
Table 18	111 598.30	0.00	Very strong significance
Table 19	50 200.07	0.00	Strong significance
Table 20	222 473.10	0.00	Very strong significance

**Appendix 2: Frequencies on poor households using different poverty thresholds
for the 1997 OHS data set**

1. Total household expenditure less than R586 p.m

	Frequency	Percent
Poor	2445	61.9
Non-poor	1503	38.1
Total	3948	100

2. Total household expenditure less than R650 p.m

	Frequency	Percent
Poor	2445	68.5
Non-poor	1503	31.5
Total	3948	100

3. Total household expenditure less than R700 p.m

	Frequency	Percent
Poor	2445	68.8
Non-poor	1503	31.2
Total	3948	100