Poverty Methods Summer School
University College Cork, 21st June 2012

The Poverty and Social Exclusion Project

Mike Tomlinson
Queen’s University Belfast

Poverty and Social Exclusion in the UK

www.poverty.ac.uk
PSE Aims

1. Improve the measurement of poverty, deprivation, social exclusion and standard of living.

2. Measure the change in the nature and extent of poverty and social exclusion over the past ten years.

3. Produce policy-relevant results about the causes and outcomes of poverty and social exclusion and how best to address these problems.
Method – operationalise ‘consensual poverty’

- Two aspects: income and deprivation
  1. Lacking a standard of living which is regarded as socially acceptable
  2. Excluded/marginalised from participating in activities which are considered the norm

- Two ways of conceptualising the link:
  Normative – with reference to what exists
  vs
  Consensual – based on entitlement
Methods used to achieve project aims:

1. Focus groups, cognitive testing
2. Quantitative surveys (2)
3. Qualitative interviews with low income families
4. Engagement with policy-making
5. Involvement of low income groups and areas
2. Method used to operationalise ‘consensual poverty’

Two stages:

Survey 1 – Defining necessities (majority vote)

Survey 2 – Determine who experiences an enforced lack of socially perceived necessities
  – Define the household income level at which people run the greatest risk of not being able to afford the socially perceived necessities
2. Survey 1 – Defining necessities/deprivation items

Online version of survey at www.poverty.ac.uk (alt)

Door-to-door – Participants asked to sort pack of 76 cards

Box A: ‘necessary’; ‘people in NI should not have to do without’

Box B: ‘desirable’ items

Box C: Don’t know
2. Survey 1 – Selection of items

76 items (30 relating to children)

Considerations:
• Comparisons with other surveys
• Standards and expectations change
• Expert views not always same as popular views
• Spectrum of living standards

Main innovations:
‘all recommended dental work’
‘hair done or cut regularly’
‘table with chairs at which family can eat’
‘taking part in sport/exercise activities or classes’
2. Survey 1 results:

Adult items:

11 items scored £ 75% 
including dental work, fresh fruit and veg daily

12 items 55-74%
including Church, table + chairs, sport/exercise, contents insurance

4 items borderline majority
including car, unexpected expense, shoes, new clothes

10 items 35-44%
including holiday, replace furniture, presents, haircut

9 items 30% or below
including computer, internet, out socially, dishwasher
2. Survey 1 results:

Children’s items:

PSE used 30, EU-SILC 2009 used 19

12 items scored ≥ 75%
  including books, outdoor space, study area, clubs

6 items 55-74%
  including, internet, family trips, outdoor kit

6 items borderline 47-54%
  including pocket money, school trips, bicycle, holiday

4 items below 30%
  including mobile phone (for 11+), MP3 player
Is there a consensus on ‘necessities’?

YES but some differences: representation?

<table>
<thead>
<tr>
<th>Item</th>
<th>Male</th>
<th>Female</th>
<th>Younger (16-24 years)</th>
<th>Older (65+ years)</th>
<th>Managerial and professional occupations</th>
<th>Partly skilled and unskilled manual</th>
<th>Tertiary</th>
<th>Primary</th>
<th>Catholic</th>
<th>Protestant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damp-free home</td>
<td>91%</td>
<td>82%</td>
<td>88%</td>
<td>84%</td>
<td>102%</td>
<td>90%</td>
<td>83%</td>
<td>91%</td>
<td>91%</td>
<td>93%</td>
</tr>
<tr>
<td>Heating to keep home adequately warm</td>
<td>92%</td>
<td>82%</td>
<td>90%</td>
<td>85%</td>
<td>93%</td>
<td>85%</td>
<td>83%</td>
<td>85%</td>
<td>83%</td>
<td>85%</td>
</tr>
<tr>
<td>Two meals a day</td>
<td>85%</td>
<td>87%</td>
<td>90%</td>
<td>82%</td>
<td>84%</td>
<td>77%</td>
<td>80%</td>
<td>81%</td>
<td>81%</td>
<td>81%</td>
</tr>
<tr>
<td>Washing machine</td>
<td>93%</td>
<td>85%</td>
<td>83%</td>
<td>74%</td>
<td>74%</td>
<td>83%</td>
<td>82%</td>
<td>84%</td>
<td>84%</td>
<td>84%</td>
</tr>
<tr>
<td>Replace/repair broken electrical goods (eg fridge, washing machine)</td>
<td>83%</td>
<td>85%</td>
<td>83%</td>
<td>82%</td>
<td>80%</td>
<td>77%</td>
<td>84%</td>
<td>85%</td>
<td>81%</td>
<td>86%</td>
</tr>
<tr>
<td>A warm waterproof coat</td>
<td>89%</td>
<td>80%</td>
<td>85%</td>
<td>85%</td>
<td>84%</td>
<td>80%</td>
<td>77%</td>
<td>81%</td>
<td>81%</td>
<td>81%</td>
</tr>
<tr>
<td>Fresh fruit and vegetables every day</td>
<td>87%</td>
<td>83%</td>
<td>73%</td>
<td>70%</td>
<td>71%</td>
<td>77%</td>
<td>84%</td>
<td>83%</td>
<td>84%</td>
<td>84%</td>
</tr>
<tr>
<td>All recommended dental work/treatment</td>
<td>83%</td>
<td>83%</td>
<td>78%</td>
<td>71%</td>
<td>80%</td>
<td>80%</td>
<td>80%</td>
<td>78%</td>
<td>80%</td>
<td>80%</td>
</tr>
<tr>
<td>Telephone at home (landline or mobile)</td>
<td>72%</td>
<td>72%</td>
<td>64%</td>
<td>83%</td>
<td>66%</td>
<td>75%</td>
<td>88%</td>
<td>79%</td>
<td>79%</td>
<td>79%</td>
</tr>
<tr>
<td>Keep home in a decent state of decoration</td>
<td>63%</td>
<td>69%</td>
<td>74%</td>
<td>66%</td>
<td>69%</td>
<td>60%</td>
<td>72%</td>
<td>66%</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Meat, fish or vegetables equivalent every other day</td>
<td>59%</td>
<td>63%</td>
<td>68%</td>
<td>70%</td>
<td>70%</td>
<td>70%</td>
<td>68%</td>
<td>73%</td>
<td>73%</td>
<td>73%</td>
</tr>
<tr>
<td>Household contents insurance</td>
<td>69%</td>
<td>71%</td>
<td>64%</td>
<td>73%</td>
<td>68%</td>
<td>70%</td>
<td>66%</td>
<td>67%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>A table, with chair, at which all the family can eat</td>
<td>72%</td>
<td>70%</td>
<td>68%</td>
<td>72%</td>
<td>72%</td>
<td>73%</td>
<td>66%</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Curtains or window blinds</td>
<td>56%</td>
<td>56%</td>
<td>56%</td>
<td>69%</td>
<td>66%</td>
<td>66%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
</tr>
<tr>
<td>Appropriate clothes to wear for job interviews</td>
<td>59%</td>
<td>59%</td>
<td>70%</td>
<td>68%</td>
<td>68%</td>
<td>64%</td>
<td>59%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Regular savings (at least £20 a month) for rainy days</td>
<td>59%</td>
<td>59%</td>
<td>59%</td>
<td>68%</td>
<td>60%</td>
<td>60%</td>
<td>59%</td>
<td>59%</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>Television</td>
<td>55%</td>
<td>59%</td>
<td>53%</td>
<td>60%</td>
<td>62%</td>
<td>46%</td>
<td>57%</td>
<td>54%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Two pairs of all-weather shoes</td>
<td>55%</td>
<td>62%</td>
<td>61%</td>
<td>62%</td>
<td>62%</td>
<td>46%</td>
<td>57%</td>
<td>54%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>To be able to pay an unexpected expense of £500</td>
<td>53%</td>
<td>55%</td>
<td>44%</td>
<td>50%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Car</td>
<td>54%</td>
<td>49%</td>
<td>42%</td>
<td>59%</td>
<td>53%</td>
<td>48%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Replace worn out clothes with new (not second hand) ones</td>
<td>53%</td>
<td>47%</td>
<td>41%</td>
<td>57%</td>
<td>48%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
</tr>
<tr>
<td>A small amount of money to spend each week on yourself, not on your family</td>
<td>48%</td>
<td>48%</td>
<td>42%</td>
<td>59%</td>
<td>40%</td>
<td>43%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Replace any worn out furniture</td>
<td>48%</td>
<td>45%</td>
<td>38%</td>
<td>52%</td>
<td>48%</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
</tr>
<tr>
<td>Presents for friends or family once a year</td>
<td>46%</td>
<td>43%</td>
<td>45%</td>
<td>48%</td>
<td>48%</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Regular payments into an occupational or private pension</td>
<td>48%</td>
<td>43%</td>
<td>45%</td>
<td>38%</td>
<td>40%</td>
<td>47%</td>
<td>47%</td>
<td>47%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>An outfit to wear for social or family occasions such as parties and weddings</td>
<td>42%</td>
<td>43%</td>
<td>45%</td>
<td>38%</td>
<td>40%</td>
<td>37%</td>
<td>45%</td>
<td>45%</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>A nest joint (or its equivalent) once a week</td>
<td>40%</td>
<td>37%</td>
<td>42%</td>
<td>49%</td>
<td>40%</td>
<td>34%</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Hair done or cut regularly</td>
<td>44%</td>
<td>43%</td>
<td>41%</td>
<td>48%</td>
<td>40%</td>
<td>46%</td>
<td>38%</td>
<td>38%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>41%</td>
<td>42%</td>
<td>35%</td>
<td>52%</td>
<td>39%</td>
<td>32%</td>
<td>38%</td>
<td>35%</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>Home computer</td>
<td>42%</td>
<td>43%</td>
<td>32%</td>
<td>42%</td>
<td>33%</td>
<td>24%</td>
<td>32%</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Internet connection at home</td>
<td>34%</td>
<td>35%</td>
<td>36%</td>
<td>37%</td>
<td>26%</td>
<td>24%</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Dishwasher</td>
<td>13%</td>
<td>9%</td>
<td>8%</td>
<td>13%</td>
<td>12%</td>
<td>11%</td>
<td>13%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Representation of survey 1 results:

**Interactive** scatter plot
Survey 2 - Social exclusion

B-SEM: Bristol Social Exclusion Matrix

Resources:
• Material/economic resources
• Access to public and private services
• Social resources

Participation:
• Economic participation
• Social participation
• Culture, education and skills
• Political and civic participation

Quality of life:
• Health and well-being
• Living environment
• Crime, harm and criminalisation
Survey 2: Social exclusion

Domains in Main Survey

Housing
Fuel poverty
Area/neighbourhood deprivation
Local services
Income change and indebtedness
Education & Parenting
Employment and working conditions
Health and disability
Time

Social networks and support
Necessities
Intra-household decisions
Poverty over time and subjective poverty
Subjective well-being (‘satisfaction’)
Harm, crime, criminalisation
Critical life events
Social and political engagement
Experience of the Troubles (N Ireland only)
2. Combining survey 1 and 2

Statistical analysis used to:

- Determine validity and reliability of items
- Determine ‘additivity’ of items

Define four groups (GB result for 1999):

- ‘Poor’ (low income, high deprivation) (25%)
- ‘Rising out of poverty’ (high dep + high income) (2%)
- ‘Vulnerable’ (low income, low dep) (13%)
- ‘Not poor’ (60%)
3. Qualitative interviews

Family support (intergenerational)
Economising
Tipping points: interactions with social protection policy change
4. Policy engagement

Deprivation measures – issues

Low income and/or deprivation?

Low income 70/60/50% of median (UK/NI?) (BHC or AHC?)

Deprivation score severity?

‘Consistent’ poverty
Survey 1 results: issues

Pensioners’ deprivation items, DWP

- At least one filling meal a day   99%
- Go out socially at least once a month   72%
- See friends or family at least once a month   95%
- Take a holiday away from home   60%
- Able to replace cooker if it broke down   89%
- Home kept in good state of repair   96%
- Heating, electrics, plumbing and drains working   98%
- Have a damp-free home   94%
- Home kept adequately warm   96%
- Able to pay regular bills   96%
- Have a telephone to use, whenever needed   99%
- Have access to car or taxi, whenever needed   90%
- Have hair done or cut regularly   89%
- Have a warm waterproof coat   98%
- Able to pay an unexpected expense of £200   87%

Omnibus score (or closest equivalent)

- 88
- 28
- 43
- 40
- 80
- 71
- -
- 92
- 92
- -
- 72
- 50
- 36
- 80
- 51
Deprivation measures – issues

1. Three categories?
   Pensioners, Children and Overall

2. Prevalence weighting
   a) DWP May 2011 new measure – score of 20 for pensioners, 25 for children
   b) Non-monetary reasons for lacking items

3. Deprivation rate (EU-SILC):
   Proportion lacking 3 or more out of 9 items
   e.g. 2010: 13.4% UK
   19.6% Ireland (S)

4. Consensus vs expert?
   • 5 of 11 deprivation items in Ireland measure are below 50% threshold in PSE survey 1
   • 3 of 9 EU deprivation items are below or on margins of 50% threshold in PSE survey 1
<table>
<thead>
<tr>
<th>Ireland 2007 (2 of 11)</th>
<th>EU 2009 (3 of 9)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two pairs of strong shoes</td>
<td>To have a washing machine</td>
</tr>
<tr>
<td>A warm waterproof overcoat</td>
<td>To have a colour TV</td>
</tr>
<tr>
<td>Buy new not second-hand clothes</td>
<td>To have a car</td>
</tr>
<tr>
<td>Meat, chicken, fish (...) every second day</td>
<td>Meat, chicken, or fish every second day</td>
</tr>
<tr>
<td>Roast joint or its equivalent once a week</td>
<td>To have a telephone</td>
</tr>
<tr>
<td>Go without heating during the last year through lack of money</td>
<td>To pay for arrears (mortgage or rent, utility bills or hire purchase instalments)</td>
</tr>
<tr>
<td>Keep home adequately warm</td>
<td>Keep home adequately warm</td>
</tr>
<tr>
<td>Presents for family/friends at least once a year</td>
<td></td>
</tr>
<tr>
<td>Replace any worn out furniture</td>
<td>Face unexpected expenses</td>
</tr>
<tr>
<td>Have family or friends for a drink or meal once a month</td>
<td>One week annual holiday away from home</td>
</tr>
<tr>
<td>Have a morning, afternoon or evening out in the last fortnight, for entertainment</td>
<td></td>
</tr>
</tbody>
</table>
‘Consistent poverty’, 11-item index: (PSE 2011)

Lacking two or more of:

1. Two pairs of strong shoes – 54%
2. A warm waterproof overcoat – 80%
3. Buy new not second-hand clothes – 51%
4. Eat meals with meat, chicken, fish (or vegetarian equivalent) every second day – 72%
5. Have a roast joint or its equivalent once a week – 40%
6. Had to go without heating during the last year through lack of money – N/A
7. Keep the home adequately warm – 92%
8. Buy presents for family or friends at least once a year – 43%
9. Replace any worn out furniture – 44%
10. Have family or friends for a drink or meal once a month – 43%
11. Have a morning, afternoon or evening out in the last fortnight, for entertainment – 28%

Five items are below threshold
Child Poverty Act 2010

By 2020:
1. Proportion of children living in low income households (<60% UK median income) must be <10% of all children.
2. Less than 5% should be in the ‘combined low income and material deprivation’ category by the same date.
3. Less than 5% of all children in ‘absolute low income’
4. Reduce ‘persistent poverty’ by 2015 (Persistent poverty is 3 year spell of income poverty)
4. Policy engagement

1. UK Govt attack on income measure
   ‘Average’, mean and **median confusion**
   Cause of poverty lies in behaviour
   120,000 troubled families

2. Measure for ‘Europe 2020 Strategy’
   At risk of poverty (<60% median)
   Low work intensity (20% in the past year)
   Severe material deprivation (4 of 9 items)
   Proposed expansion of items opposed
5. Involving low income groups and areas

1. Link up with other projects
2. Capacity building
3. Recording experience systematically
4. Representing experience through video and images on website
5. Monitoring low income localities and ‘auditing’ child poverty strategy