

HOUSEHOLD ECONOMIC STRATEGIES:

Review and Research Agenda*

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Within a number of disciplines such as anthropology, demography, economics, history, and sociology, renewed interest recently has been manifested in research on family and domestic groups. In contrast to traditional studies that sought universal patterns of family structure and function, contemporary research tends to devote greater attention to the diversity of historically specific patterns (Yanagisako 1979). Many scholars are currently focusing on the relationship between changing forms of production and the domestic group formations through which the immediate material needs of most individuals are met.

The study of household behavior is pursued primarily as a means of bridging the gap between social and individual levels of analysis. The key concept in making this link is that of mediation. In response to the opportunities and constraints defined by broad historical and structural processes, the domestic unit is conceived of as mediating a varied set of behaviors (for example, labor-force participation, consumption patterns, and migration) that are themselves conditioned by the particular make-up of this most basic economic entity. The focus on domestic unit mediation of individual decisions and behaviors permits the study of differential responses to general structural conditions as well as the analysis of changes specific to subgroups of the population.

When theoretically positioned, the household focus is a descriptive and analytical tool that can provide insights into a range of social processes (Torrado 1981, 205). Household studies thus have the potential to bridge the analytical gap separating microeconomic theories that concentrate on the atomistic behavior of individuals (sometimes aggregated within household units) from the historical-structural approach that focuses on the political economy of socioeconomic and political development (Wood 1982b, 3). In providing an intermediate analytical step, the

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household focus does not replace the need to study patterns at the individual or macrostructural level. Rather, it allows a richer and more complex approach that entails movement from one level to another at different analytical moments. In this way, the household constitutes both an intermediate level of analysis as well as a convenient unit for the collection of empirical data. In itself, the household is not theoretically meaningful. It can be analytically useful, however, within diverse theoretical perspectives, including neoclassical economics (Becker 1981), the *life course* (Haraven 1978), and Marxist and related historical-structural approaches.

In the last decade, Latin American social scientists have produced a plethora of studies that focus on patterns of economic behavior at the household level. The concept of *family survival strategies* was first used by Duque and Pastrana (1973) in a study of poor families in a peripheral area of Santiago. Like the concept of *marginality*, survival strategies was found to be a useful concept in addressing fundamental dilemmas generated by the patterns of dependent capitalist development in the Latin American region (PISPAL 1981, 147). Broadly speaking, the *development style* pursued by Latin American nations has been characterized by the inequitable distribution of income and by the concentration of investments in certain capitalist sectors. While development has increased dependence on monetary income for the purchase of goods and services, dependent capitalism has generated a heterogeneous market structure that excludes large segments of the population from a stable income adequate to permit full participation in the consumer market (Argüello 1981, 195–96; Borsotti 1981, 165; Margulis 1980, 48; Margulis, Rendón, and Pedrero 1981, 295; Rodríguez 1981, 240–41; Sáenz and DiPaula 1981, 149–50, 153).

Because of their exclusion from the benefits of economic growth, the poor were seen as *marginal*. Early theoretical approaches in the tradition of the culture of poverty (Lewis 1968) tended to view poverty as a set of deprivations that were perpetuated across generations, continually undermining the capability of the poor to change their own situation. More sophisticated analyses of *marginal* and *informal-sector* populations explicitly recognized the active, resourceful role played by the poor in providing for their own sustenance despite their lack of access to services and to an adequate income (Jelin 1982, 2–3; Peattie 1975; Perlman 1976; Roberts 1978). The strategies of the poor include the use of goods and services from both capitalist and noncapitalist productive activities (Bolles 1981, 84; Borsotti 1981; Margulis 1980; Margulis, Rendón, and Pedrero 1981; Rey de Marulanda 1982; Sáenz and DiPaula 1981). Complex patterns of migration can be viewed as one mechanism that permits the poor to draw on diverse economic sectors for their sustenance (Aramburú 1981; Arizpe 1982; Dinerman 1978; García, Muñoz, and Oliveira 1978; Pessar 1982; Selby and Murphy 1982; Wood 1981). In contrast to the

earlier tendency to conceive of poor populations as passive “victims,” the concept of “survival strategies” highlighted their active, productive role in society (Sáenz and DiPaula 1981, 149).

Subsequent studies in this tradition have used a variety of concepts—most commonly survival strategy, but also *existence strategy*, *reproductive strategy*, *life strategy*, and *life project*—to analyze the microsocial behavior of low-income populations. While this research has yielded rich ethnographic insights, it has also raised a host of problems that remain largely unresolved.¹ This essay will review some of the key methodological and theoretical problems associated with the use of the concept of household strategies and will draw out their implications for future research on this topic. Its purpose is not to present a comprehensive review of the different kinds of approaches used to study household behavior but to focus primarily on studies that draw upon a historical-structural approach to the analysis of urban populations in Latin America. Because domestic group patterns become meaningful only when placed within their broader social context, including the relevant social classes or fractions of the concrete society that are the object of study (Balán and Jelin 1980; Torrado 1981, 213–15), this analysis is tailored to the historically specific conditions of the industrial working class in contemporary Latin America.

Household Economic Strategies

It is necessary to begin by establishing a working definition of household economic strategies. The boundaries and functions of domestic units vary across societies and through time. In some cases, coresidence is coterminous with kinship relationships. Domestic units may also be the principal locus of production or of biological reproduction. In many cases, coresidence defines the unit of most forms of consumption and of the final pooling and redistribution of resources to individuals. These elements of material consumption usually provide the basis for defining the household. As used here, the *household* (or *domestic unit*) refers to a coresident group of persons who share most aspects of consumption, drawing on and allocating a common pool of resources (including labor) to ensure their material reproduction.

In contrast to societies where households are the principal units of production, domestic groups in industrial working-class communities are characterized by their dependence on wage income (Macedo 1979; Tilly and Scott 1978, 105). In a capitalist system, labor power produced by the domestic unit is embodied in individuals who sell their capacity to work to the owners of the means of production. Theoretically, the cost of producing labor power is borne by the capitalist sector, through direct or indirect wages sufficient to support workers and their potential replace-

ments (children). In reality, the salary tends to cover only a portion of the long-term consumption needs of the household, that portion needed to maintain workers during their working years (Meillassoux 1981, 102).

The notion that the satisfaction of material needs of working-class households is primarily a function of the capitalist wage should be viewed merely as a point of departure for analysis (Rapp 1978). This conception often underlies the assumption of a nuclear family model comprised of a male breadwinner, his nonworking wife, and dependent children. In reality, women in working-class households commonly are primary or supplementary wage earners. The tendency for salaries to be insufficient to cover consumption needs forces families to resort to strategies to stretch and supplement the wage (Deere, Humphries, and Leal 1978). These strategies draw upon a multiplicity of resources aside from a primary wage. Thus, the domestic unit's overall standard of living will be derived from a combination of monetary income from different sources, benefits associated with employment, collective services provided by the state and private sector, and nonmonetary inputs from home production and wider exchanges.

In the context of wage dependency, both the meaning and relative importance of these multiple components will be a function of the level and stability of the monetary wage (Macedo 1979, 34). Households with regular monetary income also are more likely to have access to the nonwage benefits associated with formal labor-market employment and to the infrastructural advantages available in more affluent neighborhoods. Poorer households that must stretch and supplement an inadequate wage are deprived of access to many of these collective goods and services. Nonmonetary inputs from domestic work and from interhousehold exchanges also may serve different functions, depending on a household's income level. In poor households, such activities help to substitute for purchased goods and services and to diversify social resources for meeting day-to-day material needs (Anderson n.d.; Fausto Neto 1982; GETEC 1978; Lomnitz 1977; Oliveira 1975; Singer 1977). Middle-class households may invest domestic labor or manipulate extradomestic networks in pursuit of longer-term class and kin interests (Leeds 1964; Lomnitz 1971; Miller 1976; Vaneck 1974). Patterns of migration also vary for different income groups, a fact obscured by studies focusing on patterns at the individual level. Resource levels determine both the ability and the motivation to migrate, while the demographic structure of the household is an important intervening variable in the migratory behavior of individuals (Aramburú 1981; Dinerman 1978; Pesar 1982; Selby and Murphy 1982).

Salary levels, together with these other inputs, define the standard of living that is the reference for the economic strategies developed by households. It therefore can be argued that qualitative differences

distinguish what often are called "survival strategies" from what might be called "mobility strategies" (Schmink 1982). The two forms differ not only in the level of monetary income but also in the time frame that shapes their strategies (short- versus long-term) and in the diversity of activities that comprise them. In essence, financial pressures lead households to intensify strategies for generating income, using available labor and resources as fully as possible. Migratory strategies are often an important element in such schemes. Multiple economic activities thus are particularly important in resource-poor households where the monetary wage is insufficient. In this intensification effort, women play a central role. In general, whereas adult men tend to specialize in the generation of monetary income, women's roles in household strategies are typically multiple (Birdsall and McGreevey 1983, 5). These roles include unpaid domestic labor, manipulation of extradomestic networks and patron-client relationships, negotiation of access to collective services, as well as generation of income (often on an irregular, intermittent basis) (Anderson n.d.; Schmink 1982).

These qualitative differences (the time horizon of strategies, the relative significance of different kinds of inputs, the role played by women) in household strategies take as their point of reference the level of monetary earnings of a household. Despite apparently objective determinants, however, the concepts of *needs*, *standard of living*, and indeed the concept of *survival* itself are meaningful only in a particular social and historical context (Cardoso 1979; Jelin 1983; Jelin et al. 1982; Jelin and Feijoó 1980, 8–9; Merrick 1983). Because historical changes and experiences of social mobility shape both material conditions and perceptions of them (Jelin et al. 1982; Jelin 1983; Jelin and Feijoó 1980; Macedo 1979), it follows that the definition of minimal basic needs will vary over time both within and between societies (Borsotti 1981, 169). Comparisons of household strategies therefore must take as their empirical referent particular historical and social situations (Sáenz and DiPaula 1981, 156–57).

Measurement of income levels is further complicated by the need to devise approaches that take into account the characteristics of the household as a whole, not just the individual income earner (Ben-Porath 1982; Kuznets 1976). The success of a given household in generating a sufficient monetary salary will depend broadly on the fit between household composition (available labor and consumption demand) and existing opportunities in the labor market. Because both household and labor-market structures are continually evolving, the fit is necessarily a changing one. Some households may have low incomes based on their internal composition and the ratio of producers to consumers within the unit. Households with small children, for example, are generally more subject to financial pressures because the younger generation is still unable to contribute to household income and, at the same time, adult

female labor time must be invested in the care of dependent household members. Other kinds of households, such as those headed by women, may be vulnerable for structural reasons unrelated to what are treated generally as phases in the typical family life cycle. Finally, internal patterns of income pooling and allocation will intervene in determining the welfare of individuals within the unit.

While the internal dynamics of household units are important in determining their standard of living at any given moment, the household's position within the social structure is decisive. A study of household composition in Belo Horizonte, Brazil, found poverty to be largely the result of the domestic unit's inability to utilize effectively its available stock of potential adult workers (Sant'Anna, Merrick, and Mazumbar 1976). The high proportion of poor households headed by women (Barroso 1978; Buvinić and Youssef 1978) also reflects their lack of fit with existing opportunities in the labor market (Buvinić 1983, 17). Not only are the heads of these households disadvantaged in the labor market because they are women, but the other members are also less likely to be prime-age male workers (Merrick and Schmink 1983). In short, the particular characteristics of labor-market structure are a primary determinant of the potential for income generation of households with varying demographic characteristics.

The study of household strategies at different income levels therefore must analyze the form in which the household is inserted into the productive structure of society. This task is complicated by the use of the household, instead of the individual, as the unit of analysis. Assigning social actors to categories that approximate discrete class positions presents conceptual difficulties under any circumstances; but these problems are compounded to the extent that the domestic unit is conceived of as mediating social-class definitions for household members (Borsotti 1977, 16–17; Rey de Marulanda 1982, 59; Torrado 1981, 209–11). Because of the role of the domestic unit in the final redistribution of income for consumption, its members somehow seem to share a common economic relationship to society. Yet, the household may combine heterogeneous relations to the productive structure that themselves change over time. The potential contradiction between income generated from individual labor-market activity and the collective needs of the household is attenuated by the strong ideological pressure of kin obligations (Jelin 1982, 24).

It has been argued that in the urban industrial setting, the most important component of household full income is the monetary wage from one or more workers. In the wage-dependent context, the intensity and form of other members' economic activities are partly a function of the wage level and contribution to the common pool of the primary earner. For this reason, households often are assigned to class categories on the basis of the primary earner's relation to production (García, Mu-

ñoz, and Oliveira 1982, 179). The same procedure can be used when all working members share the same class characteristics. Because non-working members such as housewives and dependent children are directly dependent on the breadwinner's wage, they too are often defined in terms of that person's class position. Insofar as the housewife's unpaid labor contributes directly to consumption, it partly compensates for the breadwinner's insufficient wage or incomplete pooling.

Supplementary workers also subsidize indirectly the insufficient wages of the primary worker, yet their independent relationship to the productive system makes it less appropriate to assign them to class categories on the basis of the occupation of the head of the household (Bilac 1978; García, Muñoz, and Oliveira 1979). The concept of *total family income* and the emphasis on the income of the household head can mask the diversity of sources from which income is derived (Jelin et al. 1982, 4). Any given household may include workers of differing structural characteristics and wage potential who pool their earnings to different degrees: salaried employees in different formal sector occupations, self-employed workers in the informal market, and unpaid family workers. A low or unstable income flow or inadequate pooling tend to provoke an intensification of the household's income-generating strategy that often leads to greater diversity of class and occupational positions within the domestic unit (García, Muñoz, and Oliveira 1982; Margulis 1980, 55–59; Margulis, Rendón, and Pedrero 1981, 295; Schmink 1979).

Discussion

Having set out some of the definitional and conceptual problems, I will conclude by summarizing the major criticisms and avenues for future research on household economic strategies. A basic problem is that of conceptualizing the boundaries and functions of the domestic unit. It was noted earlier that households are usually defined in primarily economic or material terms, as being analytically distinct from the sets of social relations that constitute families. But because domestic units rarely can be reduced to their purely economic functions, this abstraction is not altogether satisfactory. In most cases, the primary basis for the cohesion of the household unit is in fact a set of social relations and mutual obligations that are defined by kinship or other reciprocal relationships (Borsotti 1981, 179–80). Focusing only on the economic aspect of these relationships is misleading to the extent that behavior, including the division of labor within the household, is determined not just by economic but also by social factors (Bach and Schraml 1982, 328–29). Attention to strictly economic elements of domestic units ignores ideological and subjective determinants of behavior, factors particularly important in understanding patterns of women's behavior (Anderson n.d.; Rodrí-

guez 1981, 249; Segura de Camacho 1982). Several authors stress the importance of the worldview held by social actors in defining the meaning of social processes (Balán and Jelin 1980; Macedo 1979; Merrick 1983; Segura de Camacho 1982; SSRC 1982).

Even in considering the specifically economic aspects of household behavior, there lies the danger of reifying the household unit and ignoring other organizational forms. Especially in studies of migration decisions, nonresident family members should be included in the analysis (Wood 1981). Similarly, the appropriate unit of analysis for some forms of consumption may be a noncoresident group (Bolles 1981, 93; Jelin 1982). In the consumption of collective services, for example, broader forms of collective political organization (for example, at the community level) may be more important (Bach and Schraml 1982; Rodríguez 1981, 243; Valdés and Acuña 1981, 236). Contradictions may exist even between goals of families (for example, savings) and other units like the wider kin network that exerts pressure for a "levelling" of resources (Anderson n.d., 19; Lomnitz 1977). The most appropriate unit of analysis will depend on the particular object of study (Argüello 1981, 201; Bender 1967; Borsotti 1981, 174–75; Jelin 1982; Margulis n.d.). Jelin suggests beginning with a provisional definition of the unit, which is then disaggregated and analyzed in relation to the activities in question and finally reconstituted analytically (1982, 14). This critique, like the life-course approach used by Haraven (1978, 1) and others, emphasizes the fluid interaction of *individual time*, *family time*, and *historical time*.

The household unit therefore may not constitute the most relevant unit in mediating such diverse kinds of behavior as income pooling, consumption, labor-force decisions, fertility, migration, and others. Argüello (1981, 191) protests that the concept of survival strategies has expanded too rapidly into the study of too many areas of social reality. Family strategies sometimes have been seen as the locus of decisions bearing on distinct processes of reproduction (day-to-day, generational, labor force, social class, society at large) (Rodríguez 1981, 246–47; Torrado 1981, 204–5). But the complexity of these processes impedes any mechanistic association of social class with family structure, a tendency that verges again on a functionalist explanation for the adaptive behavior of the poor.

A major focus of studies of households is on the sources and patterns of variability that belie attempts to construct universal theories vis-à-vis the family (Borsotti 1981, 185; Jelin 1982, 15; Yanagisako 1979). Variability stems from factors at different levels: historical conjunctural changes at the macrolevel, internal social differentiation (class, ethnicity, and income levels), and demographic variables within the household unit (that is, life cycle). Each level can affect variations in both material conditions and perceptions of these factors by the social actors involved.

Comparative studies can go beyond statistical findings by choosing social groups that have theoretical relevance.

The assumptions underlying the decision rules imputed to household strategies also have been carefully scrutinized. A "veneer of free choice" is often implied by the concept of strategies, especially as used in neoclassical economic models of household decision making (Wood 1982a, 11). Household decisions are made within the confines of limiting structural constraints (Balán and Jelin 1980, 15; Torrado 1981, 206), although families nevertheless operate with a degree of "relative autonomy" (Humphries 1982). Also, to what extent does the concept of strategy imply conscious, rational behavior? Most studies focus only on the outcome of behavior, presuming that the logic motivating household decisions is revealed in crystallized form by the outcome of those decisions (Borsotti 1981, 183; Christopherson 1983; Schmink 1979; Segura de Camacho 1982, 87; Torrado 1981). The existence or nonexistence of explicit goals and the nature of their content and time frame are questions for empirical research (Anderson n.d.; Fausto Neto 1982; Macedo 1979; SSRC 1982; Torrado 1981, 206). A longitudinal approach that would clarify the regularities and patterns of change in household composition and behavior is recommended by several authors (García, Muñoz, and Oliveira 1982; Jelin 1982, 15; Rodríguez 1981, 249; Valdés and Acuña 1981, 237). If households have no explicit objectives and merely respond to one set of circumstances after another, then the concept of strategy becomes synonymous with the household's history (Bach and Schraml 1982; Jelin 1983; Merrick 1983; SSRC 1982). Like the concept of adaptation, that of strategy can lose its meaning to the extent that it becomes a mere functionalist label applied *ex post facto* to whatever behavior is found.

Finally, the internal process of decision making is relatively neglected in studies of household strategies. How are decisions made *vis-à-vis* different aspects of household welfare (Barlett 1980; Borsotti 1981, 174; SSRC 1982)? The impact of authority structures and of internal power differentials deserves greater attention (Balán and Jelin 1980, 13; Buvinić 1983, 18; Fausto Neto 1982; Jelin 1982, 25; Macedo 1979, 40–41; Merrick 1983; Torrado 1981, 206). In the absence of more precise information about these internal processes, the concept of household strategies runs the risk of implying harmony of objectives within that unit (Balán and Jelin 1980, 13; Dwyer 1983, 2; García, Muñoz, and Oliveira 1982, 22; Jelin 1982). While some agreement on general goals (such as survival) is probable, conflict and tension between household members also can be expected, especially between generations and between the sexes (Anderson n.d.; Balán and Jelin 1982; Dwyer 1983; Jelin 1982). Some studies have focused on these tensions (Banck 1980; Fausto Neto 1982; Jelin 1982, 1983; Macedo 1979, 113–15; Segura de Camacho 1982, 87–88), but

more systematic information is needed in order to understand in which spheres and at what moments the decision-making process becomes fragmented into individual goals. Put another way, preferences of individuals in a family may not be sufficiently consistent to constitute a single "utility function" (Arthur 1982, 394). Some studies have focused on not one but multiple parallel strategies followed by different household members (Anderson n.d.; Dwyer 1983, 3–5; Jelin 1982, 14).

Research on the behavior and strategies of domestic units can be expected to continue to proliferate. With a number of studies already in print, along with some telling critiques of these approaches, it can be hoped that the next generation of research will shed light on the problems that remain. The study of household mediation is to be encouraged because of its methodological potential for linking different levels of analysis. Careful studies of particular aspects of household behavior can suggest findings of broader theoretical importance. They are especially welcome as a corrective to mechanistic, top-down models of social change that reserve no place for the actions of relatively powerless and excluded populations in the making of history.

NOTE

1. A direct stimulus to research on family strategies and their relationship to the reproduction of labor was provided in 1978 by the Programa de Investigaciones Sociales sobre Población en América Latina (PISPAL) in its detailed outline of priority topics for research (PISPAL 1979). The following year, PISPAL sponsored a workshop to discuss conceptual and methodological issues that had emerged in research on family strategies (see *Demografía y Economía* 15, no 2 [1981]). The principal debates that characterized the workshop have been echoed in other seminars on similar topics in Latin America during recent years. Examples include the seminar on "Life Conditions of the Urban Popular Sectors" sponsored by CEDES, Buenos Aires, 4–7 December 1979 (see Balán and Jelin 1980), and the meeting on "Demographic Research in Latin America: Linking Individual, Household, and Societal Variables," sponsored by the Social Science Research Council, Ixtapan de la Sal, Mexico, 23–27 August 1982 (see Merrick 1983; SSRC 1982). Argüello cites his experiences at several other meetings where the "small ghost" of survival strategies haunted the proceedings (1981, 190).

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