

# A Guide to Gender Research Methodologies

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### 1. *WHAT DOES THIS GUIDE PROVIDE?*

1. **Overview** of three common forms of gender methodologies used for research in the development arena, including a list of international organizations that have used the approach, key texts and critiques, and a link to our database of examples and further reading.
2. **Database** containing further reading materials, as well as an extensive list of examples of the methodologies used in research projects, and also and examples of ways they have been adapted into policy and program development, evaluation, and analysis.
3. **Glossary** of key terms (note: where terms appear underlined in bold, they are directly linked to the Glossary section)
4. A "**How To**" guide providing general methodological steps to "gender" surveys, interviews, and other methods used to carry out gender-sensitive research.

### 2. *WHAT IS A METHODOLOGY?*

A **methodology** is a theory and analysis of how research should be conducted.<sup>1</sup> Methodologies are often confused with **epistemologies**, which are theories of knowledge. Feminist epistemologies acknowledge the following facts: that "traditional" epistemologies ignore women's knowledge, that the voice of science is a masculine one, and that history is written from only the point of view of men (of the dominant class and race) and therefore offer alternative theories of knowledge that legitimate women as knowers.<sup>2</sup> Similarly, methodologies used for gender research were developed from critiques of particular sex, class, and race biases in traditional research methodologies.

One of the most important of the aspects of gender research is the concept of research methodology as a perspective – not a specific **method**.<sup>3</sup> The perspective underlying the research methodology is most important to gender-sensitive research because the “[t]heoretical frameworks which undergird...research projects greatly influence what questions are investigated, what data is collected from whom, and how that data is analyzed, interpreted, and reported.”<sup>4</sup> For the purposes of development research, however, gender methodologies are more difficult to implement, as they do not have strict guidelines, but rather overarching themes. In order to take into consideration gender issues in all of their complexities, gender methodologies must be able to adapt to different circumstances and situations. In fact, a key aspect of gender methodologies is their *flexibility*.

Although feminist research methodologies are flexible, they also have several commonly agreed upon characteristics:

1. Consideration of **gender relations** throughout the development process.
2. Representation of diversity, with special attention to the voices of the marginalized.
3. Analysis of the relationships between and among all research parties (including the researcher/s).
4. Common use – and sometimes privileging – of methods such as life stories, personal histories, etc. that are considered “untraditional” or “anecdotal” in the physical and social sciences.
5. Research is a form of political action and should therefore aim to:
  - a. Better the lives of women
  - b. Create social change – including in social institutions, structures, and cultures (all of which are gendered).<sup>5</sup>

### **3. WHICH METHODS ARE MOST USEFUL WHEN CONDUCTING GENDER RESEARCH?**

Research on gender is more commonly associated with **qualitative** rather than **quantitative** methods. On the other hand, research in the field of development has focused almost solely on quantitative methods for the gathering of data. Quantitative data – statistical data on poverty, household income, and health for example—are collected to provide “indicators” of development in many areas.

Historically, women researchers have critiqued quantitative methods, arguing that “quantitative research techniques – involving the translation of individuals’ experience into categories predefined by researchers – distort women’s experience and result in a silencing of women’s own voices.”<sup>6</sup> They argue that, because of the complexity of gender relations, **gender-sensitive** research must be flexible. This flexibility is useful for the study of gender, as many of the social phenomena that need to be understood in terms of gender relations cannot be easily quantified by numerical statistics or values. For example, development expert and economist Devaki Jain asserts that work of women

researchers in the development field “led to an understanding that the way statisticians measured women’s roles and contributions within economies was flawed.”<sup>7</sup> This understanding brought about different ways of collecting data about women’s lives, including an emphasis on the collection of **gender-disaggregated** data. And such adaptations have been successful in many instances. For example, over the past decade certain measurement tools (or indicators) have been created within the United Nations System which attempt to quantitatively measure women’s status. See, for example, the *Gender-Related Development Index* (GDI) < <http://hdr.undp.org/statistics/data/indicators.cfm?x=227&y=1&z=1>>, the *Gender Empowerment Measure* (GEM) < [http://hdr.undp.org/reports/global/2003/indicator/indic\\_207\\_1\\_1.html](http://hdr.undp.org/reports/global/2003/indicator/indic_207_1_1.html)>, and also *The World’s Women: Progress in Statistics* series (latest edition published in 2005) <<http://unstats.un.org/unsd/demographic/products/indwm/wwwpub.htm>>. The United Nations Statistics Division (UNSD) has also published a variety of methodological documents regarding the collection and analysis of data about women and gender indicators < <http://unstats.un.org/unsd/progwork/> >.

Even with such mechanisms in place, feminist researchers argue that “[r]esearch which only documents differences between the sexes offers no understanding of why those differences exist or who such differences may be attenuated and therefore may reinforce (or create) the public’s preconceived sexist attitudes.”<sup>8</sup> That is, although **gender disaggregated** research and data is useful – and necessary –only when accompanied by a serious **gender analysis** does the data work towards producing change in the lives of women.

Take, for example, the study of women and poverty. A recent study by the United Nations DESA on the availability of statistical data from 204 countries and regions world-wide found that, even where data on economic factors was present and disaggregated by gender: “...from a gender perspective, much of the economic data used in poverty analysis are deficient owing to poor recognition of women’s economic contributions and/or to conceptual limitations that exclude key elements of women’s work.”<sup>9</sup> In addition, UNRISD recently described the way in which statistics that *are* collected are often ignore gender differences, such as those regarding “...markets and macroeconomic flows (trade, capital) [which] are not subjected to... gender analysis, the implicit assumption being that they are essentially benign and gender neutral.”<sup>10</sup> Further, in the case of the *gender and migration*, “... [t]he predominance of women migrating as ‘dependent spouses,’ the invisibility of women’s labour (e.g. domestic labour), restrictions on their right to work and involvement in activities that are deemed to be criminal offences or against public order (e.g. sex work) mean that a higher proportion of women are statistically invisible and undocumented.”<sup>11</sup> In these instances, the quantitative data collected by, for example, household surveys, cannot tell us if women are contributing less to the household in monetary terms, or if the trade and capital flows are affecting women differently than men, and why or why not. In other words, if data derived from traditional **quantitative** methods tells us the “how many and where,” then methods from a gender perspective explain the “why.”<sup>12</sup>

It should be noted that gender methodologies are increasingly conducted using both qualitative and quantitative methods, and finding ways to incorporate a gender perspective when using quantitative methods is becoming increasingly imperative, both for practical and political reasons. Moreover, researchers are realizing that because “...power relations between men and women are complex, multi-dimensional and pervasive...a diversity of tools and angles are needed to disentangle and contest them.”<sup>13</sup> The following is a brief overview of the way in which researchers have interpreted quantitative methods from gender perspective <sup>14</sup>:

1. the focus of the analysis on marginalized groups and policy issues which address their primary issues and concerns
2. the ways in which key concepts were operationalized
3. the matching of statistical data to research questions
4. the transparency with which the researchers presented their data and analysis

Our **database** also provides various examples of innovative ways that gender researchers have mixed quantitative and qualitative methods in order to gain a more complete understanding of the lives of women (and men).

#### ***4. WHY USE GENDER METHODOLOGIES FOR RESEARCH IN THE DEVELOPMENT FIELD?***

For the past decade or so, the emphasis on **gender mainstreaming** in the international development arena has meant that gender issues should be considered at all levels of project design, implementation, and evaluation. As a result, **GAD** and the process of gender analysis has become very popular as a way to think about, research, and implement projects and policies focusing on gender. Gender analysis approaches “differ in terms of their conceptualization of gender, scope of institutional analysis, implications for development, and issues of social and organizational change.”<sup>15</sup> However, some commonalities include:

- The use of gender-disaggregated data.
- Consideration of gender throughout the research process, recognizing that “gender” does not equal women, but identifies the social dynamics between men and women.
- Acknowledging that women are not a single “monolithic” group.
- Defining and composing target groups, survey samples, etc, to take into consideration the broadest and most diverse sample possible (including men and women).
- Emphasis on **participation** from all actors – those affected by the policies in question, NGOs working in similar areas, etc.

As explained in the **methodologies** <link to methodologies section, not glossary> chart, there are also other non-gender specific methodologies which have been adapted for use by gender researchers. Many of these methodologies—for example the **rights-based approach** and the **participatory action research** approach – include many of the same tenets as gender research in general, including greater attention to participation, **accountability**, and **empowerment** during all stages of the research process. For example, the following quote from the High Commission for Human Rights is telling: “What is a human rights approach to poverty reduction? ...It compels us to look behind national averages and identify the most vulnerable people – and design strategies to help them.”<sup>16</sup> Like feminist researchers, those taking a rights-based approach to poverty are encouraged to move beyond “traditional” measurements of poverty in order to empower the most vulnerable, the most marginalized members of society. Or take the example of the **Capabilities Approach**, which is featured in the important Human Development Reports of the UNDP: “Women’s issues...have been at the heart of the approach from the start, both because of their urgency and because the dire situation of women around the world helps us see more clearly the inadequacy of various other approaches to development.”<sup>17</sup>

This point can also be seen with the recent shift to a focus on the achievement of the United Nations’ Millennium Development Goals (MDGs). The Millennium Development Goals are eight broad targets established by the UN to work towards the elimination of the many dimensions of poverty world-wide. These Goals also describe the “basic human rights—the rights of each person on the planet to health, education, shelter, and security.”<sup>18</sup> The data and research needed for the design, implementation, and evaluation of projects targeting these Goals needs to be varied, due to the complexity the issues themselves. There is no internationally agreed upon standard of measurement for poverty, human rights, and the like — many dimensions of the issues must be studied in order to gain a complete picture. As the recent UN DESA report “World’s Women: Progress in Statistics 2005” acknowledges:

*...although poverty is recognized to have both social and economic dimensions, poverty measurement and analysis tend to focus on the economic aspects. Both qualitative analysis and quantitative methods need to be used in measuring poverty. Such analyses would reflect factors related to the way in which poor people view themselves... and the way in which they identify and express their needs.*<sup>19</sup>

The UN DESA concludes with a call to mainstream a gender perspective into national statistic systems, and to ensure that statistics are produced with the full participation of men and women. As such, there has been a general shift to the broader means of gathering and analyzing data—including the more frequent use of qualitative methodologies.

## 5. HOW CAN I “GENDER” MY OWN RESEARCH?

One of the reasons that research from a gender perspective is so difficult to put into practice is because there is no “step-by-step” way to “gender” your research. Research that takes into consideration the complexities of gender in society comes from a certain perspective, a way of looking at the world. However, there are many excellent examples <link to database> of various ways in which a gender perspective has been integrated into different research projects and policies. However, we have also provided a general “how to” guide that will help get you started. Bear in mind, however, that this guide is not an authoritative manual. It should be viewed as a document which can provide guidance to researchers and those who are interested in “gendering” research, and is purposefully general so that it can be adapted to particular circumstances – remember that the research which best captures the nuances of gendered experiences are those that are adapted to particular circumstances. Also remember that, although some methods may be more adaptable to a gender perspective than others, it is the perspective underlying the methodologies which is most important.

**CLICK HERE** for basic outline of “how to gender research”

“Hierarchical gender relations constrain development efforts. For example, rigidities in the gender division of labour limit the effective mobilisation of women’s labour to support export production. Poverty reduction efforts are hampered where men use their authority to usurp control over resources targeted at women. Development strategies need to be informed by an analysis of gender relations and to support women’s own attempts to change the rules and practices which reinforce these gender hierarchies.”<sup>20</sup>

#### ENDNOTES:

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<sup>2</sup> Harding, Sandra, ed. *Feminism and Methodology*. Bloomington: Indiana University Press, 1987.

<sup>3</sup> Reinharz, Shulamit. *Feminist Methods in Social Research*. Oxford University Press, 1992.

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- <sup>4</sup> Waller, Andrea. "Work in Progress – Feminist Research Methodologies: Why, What, and How." Paper Presented at the 35<sup>th</sup> Frontiers in Education Conference, ASEE/IEEE, October 19-22, 2005.
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- <sup>7</sup> Jain, Devaki. *Women, Development, and the United Nations: A Sixty-Year Quest for Equality and Justice*. Indiana University Press, 2005.
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- <sup>9</sup> UN DESA. 2006. "World's Women: Progress in Statistics 2005." United Nations. Available online: [http://unstats.un.org/unsd/demographic/products/indwm/ww2005\\_pub/English/WW2005\\_text\\_complete\\_BW.pdf](http://unstats.un.org/unsd/demographic/products/indwm/ww2005_pub/English/WW2005_text_complete_BW.pdf)
- <sup>10</sup> UNRISD. 2005. "Gender Equality: Striving for Justice in an Unequal World." United Nations, pp 11.
- <sup>11</sup> Jolly, Susan, with Hazel Reeves. 2005. "Gender and Migration: Overview Report." Bridge, Institute for Development Studies, University of Sussex; UNRISD. 2005. "Gender Equality: Striving for Justice in an Unequal World." United Nations.
- <sup>12</sup> INSTRAW Paper on gender methodologies for remittances project.
- <sup>13</sup> Lewis, Desiree. "African Gender Research and Postcoloniality: Legacies and Challenges." Council for the Development of Social Science Research in Africa, Gender Series, Volume 1, November 2004. Available online: [www.codesria.org/links/conferences/gender/LEWIS.pdf](http://www.codesria.org/links/conferences/gender/LEWIS.pdf)
- <sup>14</sup> Fonow, Mary Margaret and Judith A. Cook. "Feminist Methodology: New Applications in the Academy and Public Policy." In *Signs* Vol 30, No 4, Summer 2005.
- <sup>15</sup> Miller, Carol and Shahra Razavi. "Gender Analysis: Alternative Paradigms." UNDP. Available online: <http://www.sdn.undp.org/gender/resources/mono6.html>;
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