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(Translation of Spanish Version)**

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**TYPES OF HOUSEHOLD, FAMILY LIFE CYCLE AND POVERTY  
IN COSTA RICA**

(Translation of Spanish Version)

*Jorge A. Barquero B. \**  
*Juan Diego Trejos S. \*\**

## **I. Introduction**

Over the last ten years, improvement in poverty conditions has stalled in Costa Rica, but there have been significant advances in aspects relating to the demographic transition. Poverty levels are holding around 20% of households below the poverty line, while mortality indicators have achieved a life expectancy of 78 years and fertility has reached historical replacement levels.

This situation is suitable for conceptual and empirical studies to provide information regarding the relationship between the phenomenon of poverty and conditions of socio-demographic vulnerability still being felt by a significant proportion of the country's households.

This study is aimed at exploring problems of socio-demographic vulnerability in Costa Rica, starting with an analysis of the composition and changes in the poorest households by means of two key concepts: Type of Household and Family Life Cycle, which are operationalized in variables based on the information from the Household Surveys of 1987, 1994, and 2002.

Household or family typologies (Household Type) refer to the composition of the familial and non-familial arrangements within each household, starting with kinship relations among household members, with regards to a reference person, which generally is the individual considered head of household.

Family Life Cycle refers to the different phases or stages that family arrangements usually go through, from constitution of the initial family nucleus (couple with or without children), passing through different events of change according to the growth of the initial group and the ages of its members, until the nucleus is dissolved or dispersed into new nuclei and family arrangements.

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Both concepts are related to demographic and socio-cultural patterns, such as marriage, fertility, mortality, survival strategies, cultural practices regarding sharing a dwelling or co-habitation, material living conditions and the socio-economic levels of the household or family members.

The hypothesis applied here, which is essentially exploratory, is that the type of household and the family life cycle phase can also be seen as an expression of the conditions of socio-demographic vulnerability, which worsen in households below the poverty line. This vulnerability exposes the households and their members to greater risks of social exclusion and facilitates intergenerational reproduction of poverty.

After this introduction, the paper consists of a first section, which delineates the evolution of poverty in Costa Rica and the main characteristics of the poor. The following section provides the major conceptual and methodological orientations that guided this research; the fourth section describes all the households with regards to the two study variables Household Lifecycle (HLC) and Household Type (HT). The fifth section delves into the major findings on poverty according to the HLC and the characteristics of the component members; finally, the principal study conclusions are summarized.

## **II. Poverty: Evolution and Characteristics**

Poverty studies in Costa Rica have relied primarily on indirect or poverty line measurements. These measure household income by member, as an indicator of household resources or potential capacity to meet basic needs; these are compared to a poverty line that reflects per member costs for acquisition of the goods and services necessary to satisfy basic needs. If a family's per capita income is below the poverty line, the household and its members fall into a situation of poverty. The following synthesis and the measurements carried out by household type and cycle are based on this methodological approximation.

### **The Evolution of Poverty**

From a broad temporal perspective, the data available on the evolution of poverty show that its incidence has marched hand in hand with the economic cycle. During the 60's, poverty declined from approximately 50% in 1961 to a little more than a quarter of the families by 1971, within a framework of strong economic growth (Piñera, 1979; Fields, 1980). During the 70's, the incidence of poverty continued its downward trend, although at different rates depending on the source and also within a period of economic growth (ECLAC, 1991; Trejos, 1995b). This link with the economic cycle is clearer during the 80's, when low-skilled urban wage earners appeared most vulnerable to the crisis at the beginning of the 80's. (Sauma and Trejos, 1990; Seligson, Martínez, and Trejos, 1997).

The incidence of poverty increased significantly during the crisis at the beginning of the 80's, and although this process later reverted, once again, it tended to increase anew

but with less intensity during the recessive adjustments of 1990/91 and 1995/96 (Céspedes and Jiménez, 1995; Trejos, 2000a). This pattern is reproduced even if different poverty lines are used or they are adjusted for under-declaration of income or non-response and they are present for all three conceptions, whether for incidence, intensity, or depth (Sauma and Garnier, 1998; Trejos, 2000a; Trejos and Montiel, 1999).

If poverty is defined as a situation of insufficient income to satisfy a family's basic material needs and to measure it you have recourse to the Multiple Purpose Household Surveys (EHPM) from the National Statistics and Census Institute (INEC), the panorama of its evolution over the last sixteen years can be summarized in Figure II.1.<sup>1</sup> According to this information, the incidence of poverty measured as a percentage of families below the poverty thresholds, declines from 29% of the families in 1987 to only 20% seven years later (1994), with an important situational increase during 1991.

After that year, and for the next 8 years, the incidence of poverty stalls, oscillating between 20% and 21%. This stagnation occurred in spite of the fact that the economy grew, per capita social investment expanded, and employment also increased (State of the Nation Project, 2002). It is worth noting that this evolution of poverty was similar whether we focus on the rural or urban milieu. It also maintains the same evolution if we consider individuals instead of families, or focus on extreme poverty. Finally, and as can be seen in Figure II.1, the same dynamic is reproduced when we focus on other poverty indicators, such as intensity and severity, which are more sensitive to distributive changes.<sup>2</sup> This final result allows us to focus our attention uniquely on the incidence of poverty to evaluate the possible impact of demographic variables, as they are resumed in household lifecycle and type, under an unchanging situation of poverty.

The data from Figure II.1 corroborate the indications of the foregoing paragraph and two results require highlighting. The first has to do with the absence of a process of impoverishment during the economic reforms that were emphasized as of the mid-eighties, outside of the indicated recessive episodes. This result has been explained by the favorable effect of the reforms on the agricultural sector (Morley and Alvarez, 1992), by the role played by minimum salaries (Sauma and Garnier, 1998), by the maintenance of low levels of unemployment, which enabled increases in real wages (Sauma and Vargas, 2000), and by the gradual and specific nature of the reforms that did not contemplate, among other things, massive layoffs among public employees due to privatization processes (Trejos, 2000a). In fact, and in support of this last hypothesis, there is no quantitative or qualitative evidence of the sudden appearance of the so-called "new poor", i.e., middle class workers impoverished by the reforms, particularly ex-public employees (Sojo, 1997).

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<sup>1</sup> These official estimates of poverty come from the use of poverty lines differentiated by zone, which are confronted with per capita family income, without considering equivalent scales. Incomes are adjusted by zone to correct for possible under-declaration and omission of categories, although unreported income is not imputed and families that report no current income are excluded (DGEC, 1996). For 2002, the monthly poverty lines per person are 28,895 colons (\$80) for urban areas and 22,714 colons (\$63) for rural areas. The limit for extreme poverty or indigence lies at 13,255 colons (\$37) for urban areas and 11,530 (\$32) for rural areas.

<sup>2</sup> The intensity of poverty considers both the proportion poor (incidence) and their level of poverty in terms of how much their level of income falls below the threshold of poverty (how poor they are). The severity of poverty considers both aspects, but gives greater weight to the families the poorer they are.

The second result has to do with the way the incidence of poverty has languished around 20% of the families during the last eight years, in spite of economic growth. According to Trejos (2002a), there are several explanations that have been wielded to explain this stagnation in the incidence, intensity and severity of poverty since 1994. The first refers to the extent and quality of economic growth. With regard to extent, it refers to an insufficient economic growth that does not allow for improved real wages for workers and in the same measure, real household income. With regards to the quality of the growth, this refers to the fact that it has been exclusive or concentrated in certain activities requiring primordially skilled workers, which does not allow for job creation for less skilled workers who make up the poorer households.

A second explanation of this stagnation in poverty levels refers to the deterioration of human capital in the labor force. The argument being that the crisis during the 80's had a sensible effect on secondary school coverage and this drop in coverage continued through to the beginning of the 90's, when the coverage levels that existed prior to the debt crisis were finally recovered (Trejos, 2000b). Thus, in the mid-90's, the labor market is incorporating a preponderance of individuals that have not completed secondary education and to this extent lack sufficient human capital to obtain an income that would allow them to overcome the threshold of poverty.<sup>3</sup> This would produce effects over the mid-term such as social policy deterioration, particularly in education, results that could also be supported by a significant immigration of workers with a lower educational profile.

A third explanation points to distributional aspects. If the inequality in family income distribution is increasing, supported by a possible exclusive and concentrative economic growth, improvement in real income would not be benefiting the poorest sectors and to this degree it would hinder their attempt to overcome the poverty thresholds. A fourth explanation looks at the methodological changes in household surveys. It points to an actualization of the sample in 1999, which might explain the absence of a reduction in poverty during that year and thus support the stationary trend.

Finally, among the principal explanations outlined, there is also migratory pressure. The argument here is that heavy immigration would not allow an increase in real income unless production were to grow in a strong and sustained manner. Furthermore, if this immigration consists of un-skilled workers, as seems to be the case with the Nicaraguan immigration, it would place greater pressure on the income and employment possibilities of the less qualified local workers, who are precisely the ones most exposed to suffering the scourge of poverty.<sup>4</sup> However, to these arguments on the possible negative effects of a numerically large immigration of un-skilled workers, the reduction in real wages, and increasing unemployment, it is important to contrast a

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<sup>3</sup> ECLAC (1998) estimated that young workers need a minimum of secondary education completed (12 or 13 years of education in the case of Costa Rica), to have an 80% probability of climbing out of or avoiding the fall into poverty.

<sup>4</sup> This supposes a substitute relationship between both types of workers. Nevertheless, if the immigrants are coming to do jobs that the less-skilled locals are unwilling to do, the relationship is one of complementarity and could be compatible with increases in employment and income for local workers.

positive argument, which is usually ignored: immigration increases the factor supply and to this degree the limits of productive possibilities.

Among the explanations outlined above, poor economic growth, languishing formation of human capital and, more recently, an increase in the inequality of income distribution assume the role of the main explanatory factors. Nicaraguan immigration does not seem to contribute significantly to the stagnation, an aspect that is corroborated in more recent research (Barquero and Vargas, 2004), and alterations in the sampling framework do not appear to contribute in this direction either.

This paper attempts to explore a new explanatory direction linked to demographic changes. If the incidence or risk of poverty increases as population and families age, then, without changes in the incidence of poverty, this stagnation may arise from a change in the demographic structure towards “older” persons and households. The older heads of household face increasing difficulty to stay in the labor market, and in the absence of adequate social security coverage their risk of falling below the poverty threshold increases. Additionally, the presence of household restructuring towards organizations that make them more vulnerable to poverty, such as single parent-headed households, particularly those headed by women, and single person households, may contribute to the demographic explanation of stalled poverty. The assumption followed in this paper is to take household lifecycles and types of households as variables that summarize the possible demographic changes that may have a bearing on poverty.

### **Characteristics of the Poor**

Different studies of poverty, such as those cited above, tend to corroborate the socio-demographic profile of poor households: the predominance of rural poverty, larger sized households due to a greater number of children and with a growing presence of female-headed households; earlier and less successful labor force insertions, related to early school dropouts, which is clearer among males, who have lower educational levels, while females, also with lower education, tend to participate less intensively in the labor market (Trejos, 1990). Limited female human capital restricts their possibilities of labor force insertion, while the presence of children becomes a barrier for labor market access, unless other, younger women can replace them in this role, even at the cost of their own human capital accumulation (Trejos and Montiel, 1999).

Child access and retention in primary education is quite generalized, among both urban and rural families, even though access and retention in secondary education does present serious gaps by zone of residence and income stratum (Rama, 1994). This does not occur with access to health care, however, where the existence of a national system allows ample coverage, even among poor rural families (Sauma and Trejos, 1999). Although access to the educational system has improved for the poor during the last decade, it is still insufficient to guarantee the youth from these households an

accumulation of the human capital necessary to surpass the poverty threshold in the future.<sup>5</sup>

Together with the protagonism of education in determining the probabilities of poverty, insertion into sectors in which education offers a diminished yield: agricultural activities and small-scale urban ones, constitutes another characteristic element of poor households. Both sectors are also associated with other productive assets. For those families with links to agricultural activities, studies have shown that access to, rather than ownership of, the land is important to surpass the threshold of poverty, but of greater import is type of product, where poverty is concentrated among those dedicated to traditional products for internal consumption (Rodríguez and Smith, 1994). This suggests that the quality of the land asset is another basic element to be kept in mind, as well as the technological elements that directly affect its profitability. These authors corroborate that diversification of income sources, with work outside the farm, reduces a family's vulnerability, allowing it to surpass the poverty threshold.

For families linked to small-scale or informal urban activities, Trejos and Montiel (1999) found that, although access to credit is very limited, when this is given, they improve their possibility for productive capital accumulation and its profitability. They also found that diversification of income sources within the household, inserting members into activities other than micro enterprise, makes for a significant reduction in a household's vulnerability to suffering periods of deprivation.

This profile is corroborated or complemented with the indicators from Table II.1, for 2002. The greater size of poor households, due to the greater presence of children, suggests greater fertility and a more delayed demographic transition. This means that the households with children are at greater risk for poverty, due to their greater economic dependence, thus, a greater proportion of children suffer the scourge of poverty (Trejos, 2002b), increasing the intergeneration transfer of poverty (Uthoff, 1990). This suggests that not only the households in the last stages of their lifecycle may face a greater risk of poverty, but also those at the initial stages of their lifecycle. Although the population aged 60 or more years still represents a small proportion within the total population of households, it is also clear that they are over-represented among the poor households, supporting the ageing hypothesis.<sup>6</sup>

In spite of the fact that there are no differences in the number of members in working ages between poor and non-poor households, a less intense and successful labor market incorporation, and as a result reduced social security protection upon retirement, are aspects associated with income poverty and that reinforce the economic dependence of poor households. Single parent-households, especially female-headed ones, are more frequent among poor households, which indicates that these

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<sup>5</sup> According to ECLAC (2000a) estimates, youth in Costa Rica require 13 to 14 years of education (more than completed secondary education) to have a good chance to avoid falling into poverty.

<sup>6</sup> For an incidence of poverty in 2002 of almost 21%, at the family level it climbs to 24% when you take into consideration the population, due to larger family size. The greater presence of children and older adults means that among children under 12 years of age the incidence of poverty climbs to 31% and to 28% for the population aged 60 or more years.



increasingly common forms of family organization are associated with a greater risk of poverty. Non-nuclear households also show a greater presence among the poor, which suggests that they are unsuccessful strategies for overcoming poverty.

Finally, heads of poor households are somewhat older, again supporting the ageing hypothesis, with clearly lower educational levels. Insofar as educational achievement of children depends markedly on a household's educational climate (ECLAC, 1998), it is clear that children from poor households face a more limited possibility for staying within the educational system and thus also face a greater probability of intergenerational poverty reproduction.

### **III. Conceptual and Methodological Aspects**

#### **Demographic Dynamics and Poverty**

As was already explained in the preceding section, during the 90's, Costa Rica, like the rest of the countries in Latin America, saw a stagnation, if not an increase, of poverty indices, which affected social groups and regions with a clear social and economic lag.

On the other hand, population dynamics in Costa Rica present a series of indicators that place this country at the level of a modern society with a relative advantage compared to other countries, particularly those of Central America. With a life expectancy at birth of 78 years and fertility that had reached replacement (2.1 children per woman) in 2002, together with a positive migration balance of around 20,000 per year.

Table III.1 presents the evolution of poverty, mortality, and fertility in Costa Rica between 1987 and 2002, showing a paradoxical course between demographic transition and poverty.

Both dimensions, lags in matters of social and economic equality and advances in demographic matters, appear closely and contradictorily linked. However, the direction and intensity of their interrelations continue to be a focus of debate without a clear consensus. For example, the persistence of problems in poorer geographical areas and social groups, such as early adolescent fertility, child labor, situations of violence, school dropouts, situations of unemployment or employment in low-productivity jobs, and inadequate material living conditions of some groups, occur together with behavioral patterns and modern lifestyles that promote greater female labor force participation and higher education, and in general a modification of the patterns of cultural values made possible by a greater circulation of information as a product of the processes of integration and globalization (Ariza and De Oliveira, 2001).

This situation not only signals a revival of old theoretical and ideological polemics in the fields of science and politics, regarding possible cause-effect relationships between demographic dynamics and the characteristics or dimensions of development processes, but also an analysis of these discussions from renewed approaches and

methodologies, which in addition to confirming the existence of differential behaviors and situations among social groups, allows us to recognize the socio-demographic and structural characteristics of poverty that contribute to reproduce conditions of social and demographic vulnerability found in this broad sector of the population.

### **Social and Socio-Demographic Vulnerability**

Socio-demographic vulnerability refers to the socio-demographic features that characterize those groups in conditions of greater social vulnerability, both in terms of demographic patterns and behavior that characterize these population groups, in the sense that conditions of their social vulnerability determine their observable demographic dynamics and characteristics, as well as in terms that these socio-demographic characteristics contribute to maintain and reproduce the conditions of social vulnerability (CELADE, 2002).

The variables and indicators that show conditions of socio-demographic vulnerability are many and varied in scope. The first demographic studies in Latin America on mortality and fertility differentials verified a significant association with variables such as level of education, rural-urban residence, socio-occupational reference group, and ethnicity, among others. Household and family studies also provided other variables that can now be analyzed between the poor and non-poor (by income or unmet basic needs), such as household typologies, household heads by gender and family lifecycles (as will be analyzed in this paper).

Thus, the objectives of studies on social and demographic vulnerability focus on identifying groups at greater risk, according to their vulnerability, and elucidating the socio-demographic conditions that expose them to those risks. In socio-demographic terms, these studies allow an identification of groups lagging behind in the demographic transition (Schkolnik and Chackiel, 1998).

As was mentioned at the outset, this study focuses on the type of household and the phases or stages in its lifecycle, as conditions exposing a greater social vulnerability in the face of the risk of poverty. The following explanation indicates how these variables have been operationalized, starting with the definition of households and families used in censuses and surveys.

### **The Family and Household as Units of Analysis**

Studying families through census and survey data in Latin America is a topic that has captured the attention of demographers and social scientists in general. Of particular mention are the pioneering work by Susana Torrado (1981) and CELADE (1976).

In Torrado's case, she distinguished among analytical units (theoretical level), observational units (methodological level), and enumeration units (empirical level) when studying the family and family life strategies.

As an analytical unit, the family or domestic unit would indicate a group of individuals that regularly and permanently interact, in order to ensure, on a common basis, achieving one or more of the following goals: to preserve their lives, fulfill all those economic and/or non-economic practices that are indispensable for optimizing their material and non-material conditions for existence.

In general, this interaction implies shared residence in the same dwelling unit or in close residential proximity, kinship links, and a functionality as a consuming unit, and on occasions one of production; depending in each case on the socio-economic position of the family unit. This allows us to establish a profile of the characteristics of an operational definition as a unit of observation.

As an observational unit, particularly in censuses, the information is collected at various levels: commonly the dwelling unit is identified first; within this unit, households are then identified, and then finally the members of each household. Household members are enumerated according to a certain family structure. In the Costa Rican Census, enumerator instructions indicated that they should begin by noting the head of household or family head, his/her spouse, single children, other family members, and then non-family members (INEC, 2000).

The foregoing involves two or three definitions that in census and survey design must be duly clarified and that, generally, follow guidelines under international recommendations issued on the occasion of each decennial census round. These are definitions for dwelling, household, and family.

In the case of dwelling or place of habitation, indicators related to the physical unit are applied (structural characteristics and actual use at the time of the census or survey); for household, the definitional criteria refer to certain practices of group or individual relationships, such as the fact that a common budget is shared, or other provisions taken by individuals to provide for their food requirements or their general survival.

For the family, the criteria are related to a specific degree of kinship ties (by blood, marriage, or adoption) and with certain structuring, pursuant to the stage that the family is going through, which is known as the family lifecycle. This cycle runs from the initial nucleus (a couple with or without children) through the dissolution of the nucleus or the change to other types of groupings, including other family members or not, and even, other nuclei related to the initial or principal nucleus by an ascendant or descendant route (vertically or horizontally).

Although these definitions may be conceptually clear and independent, so that there may be more than one household in each dwelling, and each household is structured differently in family and non-familial terms, there may be problems in operational terms. The most serious tend to occur when the households are identified within the dwelling and the family nuclei in the dwelling or household.<sup>7</sup>

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<sup>7</sup> A more complete discussion of this topic can be found in Barquero (2002).

## Household or Family Typologies

Both families and households may be identified two different ways:

- ? By identifying the different types of family or household during the data collection operations in the field, which requires a prior definition and adequate instruction for enumerators, as well as certain technical foresight (adaptation of instruments). This option has the advantage that greater amounts of information on family dynamics and composition are handled during the interview, which allows the use of this knowledge to obtain more exact characteristics and the self-perception of family members. The disadvantages of this procedure are greater and more complicated interviewer instructions, which require more time for the interview to set up the family groups.
- ? Another procedure is a *posteriori* construction of family groups, through data processing. It consists of the definition of a family or household typology that is achieved through the combination of one or more variables. The main variable used is that of kinship relation, but better results are obtained if it is combined with other variables, such as marital status, sex, and age of the household members. This procedure does not have the disadvantages of *in situ* identification of the first method, and tends to be the most utilized.<sup>8</sup> Notwithstanding the greater advantages of the second method for capturing the family groups, there may be allocation problems, since not all of the possible kinship relations are provided, in addition to being referred to the head of household, which makes it more difficult to ascertain the conformation or composition of the family with the depth necessary. In addition to presenting problems of non-provision of self-perception of household members, these are also related to the self-indication that they are or are not family members, or may consider themselves members of other, independent family groups. Notwithstanding this latter aspect, the typologies and essays arising from this second procedure are quite acceptable.

In Costa Rica, research on family structures follows the second procedure with slight variations, in terms of working with variables on kinship relations contained in the national censuses and household surveys to test household typologies (Reuben, 1996, Kühlmann and Soto, 1994, and Vega, 1994, this latter also includes exploratory surveys). More recently, for the first time INEC added to its database and National Census publications the variable on type of household as proposed by Barquero (2002).

All of these studies on the structure of Costa Rican households recognize the predominance of nuclear households (a proportion running between 50% and 60%). There is also evidence here and in other Latin American studies of an increase of single-parent households, principally headed by women, as well as single-person households.

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<sup>8</sup> See the articles by Torrado (1981) for Argentina, Reuben (1996) for Costa Rica, Arriagada (1997, 2001, and 2002) for the countries of Latin America.

For the purposes of this paper, the definition of the Household Type (HT) variable is based on the proposal for construction of that variable in the 2000 Census tabulations drafted by Barquero, and, with the exception of slight variations for reordering, in terms of the disaggregation of composite or extended households, is the one followed by Araya (2004). We use a summarized nomenclature here for the purpose of preparing the tables to be presented.

The household typologies with their groups and definitions were:

- ? **Nuclear without children:** Head and spouse, without children, without other kin members, and without non-kin members.
- ? **Nuclear with children:** Head, spouse, and children, without other kin members, and without non-kin members.
- ? **Nuclear single-parent:** Head, without spouse/partner, with children, without other kin members, and without non-kin members.
- ? **Extended without children:** Nuclear without children, with other kin members, and without non-kin members.
- ? **Extended with children:** Nuclear with children, with other kin members, and without non-kin members.
- ? **Extended single-parent:** Nuclear single-parent, with other kin members, and without non-kin members.
- ? **Extended without nucleus:** head, without spouse/partner, and without children, with other kin members, and without non-kin members.
- ? **Nuclear composite:** Nuclear households, with other non-kin members.
- ? **Composite extended:** Extended households, with other non-kin members.
- ? **Composite without nucleus:** Extended without nucleus, with other non-kin members.
- ? **Single-person:** Only the head.
- ? **Non-familial:** Head and non-kin members.

As will be seen below, the fact that more than one-half of the households fall into the nuclear household category, led to an exploration of the other types of groupings that would provide information on the other variable mentioned above: the lifecycle of families or households.

### **The Family Lifecycle**

As we mentioned, the family lifecycle refers to the different phases or stages that family arrangements pass through, from establishing an initial nucleus, moving through different events of change according to the growth of the initial group and the ageing of its members, until the nucleus is dissolved or dispersed into new nuclei and family arrangements.

For the definition of the family lifecycle variable, we start with the proposals by de Espíndola (1997), Arriagada (1997 and 2002), and Araya (2004). The defining

variables for the cycle are principally the ages of the women and children. In our case the age of the woman was 40 years (as in Arriagada, 2002) and for the children's age cut-off, we followed Araya (2004) but opened those of the exit cycle into two groups according to the person's age. Single person households are also disaggregated into two groups according to the person's age, since the incidence of poverty is directly associated with age.

The categories of the household lifecycle variable were:

- ? **Couple alone:** head and spouse/partner without children, where the woman is less than 40 years of age.
- ? **Start-up:** head, with or without spouse/partner, whose oldest child is between 0 and 5 years of age.
- ? **Expansion:** head, with or without spouse/partner, whose oldest child is between 6 and 11 years.
- ? **Consolidation:** head, with or without spouse/partner, whose oldest child is between 12 and 17 years.
- ? **Stabilization:** head, with or without spouse/partner, whose oldest child is 18 or more years of age and youngest child is less than 18 years of age.
- ? **Breakup or departure:** head, with or without spouse/partner, whose youngest child is 18 or more years of age.
- ? **Empty nest:** head and spouse/partner without children, where the woman is 40 or more years of age.
- ? **Non-nuclear:** head without spouse/partner or children and other kin or non-kin members.
- ? **Single-person adult:** Only the head, less than 60 years of age.
- ? **Single-person elderly:** Only the head, more than 60 years of age.<sup>9</sup>

One of the disadvantages of the traditional family lifecycle concept is that it only considers the experience of the nuclear family, so that in our case the operational definition of the variable considers households with a partner only in the extreme categories and in the intermediate categories households with and without partners are accepted. This option for considering the household lifecycle (HLC) in general and not only the family household, although not completely resolving this disadvantage, does allow us to admit other family arrangements such as single parent households arising from the separation, death or non-shared dwelling of the spouse or partner.<sup>10</sup>

In both the first lifecycle studies, as well as household typologies, the hypotheses behind them would be, on the one hand, that society's industrialization, urbanization, and modernization processes will lead to a growing "nuclearization" among families, and on the other that families would display survival strategies that were both conscious and

<sup>9</sup> Note that these last three categories do not form a part of the cycle as such, but are relevant for the analysis of vulnerability as applied in this paper.

<sup>10</sup> An additional problem, specific to household surveys, arises when the persons applying weights round off by person and not household. In this sense, there may be more heads of household than couples, or the opposite, especially in the case of couples alone. Although this is quantitatively irrelevant, if we are interested in structural changes it must be kept in mind.

unconscious, facilitating a slow growth in extended and female-headed single-parent families.

#### **IV. Household Evolution and Characteristics in Costa Rica**

The results obtained in this study, which are presented below for the household type and household lifecycle variables for Costa Rica, first for all households and then for those in poverty, lead in the direction of both hypotheses as they take into consideration different socio-economic and demographic variables.

##### **By Household Types**

As can be seen in Table IV.1, household composition in Costa Rica shows a pattern concentrated on nuclear households (around 70% during the period), where more than half of the households consist of couples with or without children, which corroborates the findings from previous studies mentioned in the preceding section. Extended households, primordially those with children, fall in second place in order of relative importance (20%) and the remaining 10% is distributed between composite and principally single-person households.

The results also show what studies in other Latin American countries found: an increase in single-parent and single-person households and couples without children, during the period studied. In Figure IV.1, we can see that during the most recent period the trend is towards a slow reduction of nuclear households with children and an increase in nuclear without children and single-parent households (principally those headed by females, as will be discussed below).

These changes seem to be associated with modifications in the values and functions assigned to union formation, to the family, and to sexuality, as well as changes in the age structure that increase the number of persons of marriageable ages (Arriagada, 1997 and 2002).

Upon examining the age structure in each type of household, in Figure IV.2, we see more clearly the effects of the demographic transition: population over age 18 predominates, with a tendency to become more numerous as the most recent period is approached, which is a product of the slow ageing of the population and reduction in fertility. The increase in elderly single-person households stands out, which, as we will see, converts into a factor of greater vulnerability to poverty.

It is worth noting that the most significant changes occur primordially between 1987 and 1994, the period that coincides with the reduction of poverty to the levels where it stagnated after 1994 through 2002.

Another of the outstanding traits in Latin American family arrangements is the increase in female-headed households, generally with children but without a partner, but there are also extended households with other kin; which in many cases may be a source of

social disadvantages for them and the other members under their responsibility. In the case of Table IV.2, households are presented by type and gender of the head of household. Note that although nuclear households with children are male-headed in close to two-thirds of the cases (64% in 2002), the female-headed households stand out among nuclear and extended single-parent types (43% and 24%, respectively).

In general, the results described so far show that the household types express the effects of the demographic transition, as well as a growing presence of households with vulnerable characteristics. In the following section, we will analyze how these characteristics are expressed according to household lifecycle stage, under the assumption that this best displays the changes in family dynamics and exposes different poverty risks at each point or stage in the household cycle.

### **By Household Lifecycle**

First, we will describe the results of the Household Lifecycle (HLC) variable for all households, before we delve further into their expression by poverty level.

Table IV.3 shows that the HLC variable seems to present the household situation better than the household typologies, with regards to their passage through different conformations, since it has a more uniform distribution, and in the case of familial households (around 90%), it shows the expected cyclical behavior, which is associated with changes in the family's demographic and social-cultural dynamics.

In 1987, the largest proportion of familial households was in the expansion stage (19%), which corresponds to families with children less than 6 years of age; by 1994, a majority fell in the consolidation and breakup stages (together they sum 37%), consisting of families with children between 12 and 17 years of age and families with children over 18 years, respectively. By 2002, a majority of households had moved to stabilization and breakup stages (18% and 19%), which correspond to families whose oldest child is over 18 years of age, but still have younger children, in the first case; and families in the breakup or departure stage, whose youngest child is 18 or more years old, in the second case.

It is interesting to note the changes during the period, insofar as family cycles can be associated to declining fertility (the total fertility rate dropped from 3.3 to 2.1 in the period under study) and population ageing (life expectancy increased by 2 years). Thus, the results seem to confirm a movement of the households towards stages in which the children are older and begin to dismantle the initial nucleus, producing a slight increase in households without children among adult couples, which increase from 4 to 7 percent of all households, as well as single-person households which climb to 7% in 2002 (as obtained either by type or household cycle).

When considering household lifecycle by age of its members and gender of the head of household, situations occur which lead to consideration of the existence of greater risks and social vulnerability in certain stages.



In the case of members' ages, in Figure IV.4 we see the situation for 2002 for familial households, where there is a greater presence of children and youths less than 18 years of age in the first stages, primordially in the more numerous households among these (expansion, school-aged children). In the intermediate ages from 18 to 49 years, they are grouped principally in households of couples without children and families in the initial stages. A higher percentage of adults and the elderly fall into the final stages of breakup and empty nest. In other words, the results tend to show that the persons are leaving their initial families or nuclei as age increases, so that they produce a concentration of persons over 50 years of age residing in households or families without children or alone (single-person).

This distribution by age and family cycle has evident consequences on the vulnerability to poverty, insofar as these specific households have more individuals in dependent ages (children and elderly) than they do wage earners.

With regards to the gender of the heads of household, in view of its direct relationship with vulnerability to poverty, Table IV.4 shows the situation at the three points in time of the study. As can be seen, during the whole study period, there is a transition from a clear predominance of male-headed households to a greater importance of female-headed households, as we go from the initial to the final stages of the family lifecycle, which is partially a product of marital patterns and mortality differentials between males and females, but it is also associated with gender differences with regards to life strategies. The greater presence of female-headed households is worth noting in those cases where the family has children with ages around 18 years and in those households that have begun the breakup (youngest children over age 18), as well as in single-person elderly female-headed households.

Note that the lifecycle variable shows greater changes between 1987 and 1994, than between 1994 and 2002, just like the household type variable, which also coincides with the evolution of poverty, which we commented at the outset of this paper, and which will be explored in the following section with regard to households in a situation of poverty.

## **V. Vulnerability in the Face of Poverty by Household Type and Lifecycle**

Greater incidence of poverty in households with young children or extended and composite households is a documented fact for Latin America during the 90's (Arriagada, 1997 and 2002), although generally circumscribed to urban zones. Here we seek to advance both with measurements for the country as a whole, as well as opening up the lifecycle stages and the type of household. Retamoso (2002) had already proposed opening up the lifecycle to separate households with school-aged children. Here, we advance further, opening up the penultimate stage, separating households with children age 18 or more years, into those that still have younger children less than 18 years of age and those where they are all adults, since there is a differential mobilization of assets and to that extent the risk of poverty varies. Furthermore, in tune

with what Arriagada established (2002), maternal age also increases with a separation between couple alone and empty nest categories.

### **Incidence of Poverty by Family Type and Lifecycle**

Table V.1 seeks to provide information for 2002 regarding whether the lifecycle stage that the household is going through, or the type of household, increases or reduces its vulnerability to undergo situations of material deprivation. Greater vulnerability to situations of poverty due to insufficient income is associated with a household's possibility of mobilizing resources, particularly its labor force, which is the most abundant resource, and the number of dependents within the household. The table shows both the incidence of poverty as well as the distribution of households in poverty and in extreme poverty.

Centering our attention on familial households, we can see how the incidence of poverty is lower among couples alone, with no dependent minors, who are able to mobilize the largest quantity of assets. As children arrive and grow, the incidence of poverty begins to increase both due to the presence of dependents and the difficulties that they imply for the mother to mobilize her manpower. Thus, the incidence of poverty increases through the stage of consolidation, i.e., during that time while the oldest child has not reached adulthood (age 18), and therefore has a limited ability to contribute additional productive resources. As the older children reach adulthood (Stabilization) and even more so when there are no children under age 18 left (Departure or Breakup), the incidence of poverty declines through lowered dependency and the expanded possibility of taking advantage of more income-earners. Once the household is left without children (empty nest), the incidence of poverty once again increases, without, however, reaching the levels of the Consolidation stage, since the members slowly lose their ability to generate income and the coverage of protection against the risks of ageing still has a limited scope in the country (see Figure V.1).

Among non-familial households, single-person households show a lower incidence of poverty with respect to non-nuclear households. The absence of dependents may explain this finding. The same pattern is reproduced when focusing on extreme poverty, however there are fewer observations, and the results may be less robust.

The distribution of poor households tends to reproduce and accentuate the distribution of all households, since the more numerous groups are the ones that tend to have a greater extension of poverty. Thus, familial households in the consolidation stage (oldest child between 12 and 17 years of age) continue to be the most numerous and represent one quarter of the country's poor households. If we add those households in the initial and expansion stages, i.e., households that only have young children, they represent one-half of the poor households in the country, and a group requiring special attention in the war on poverty, since this is where the circle of intergenerational reproduction of poverty is consolidated or broken.

The relationship between type of household and poverty is less clear, since a majority of households are set up as nuclear households (see Figure V.2). Within these households, the presence of children or the absence of a spouse/partner increases the risk of poverty. Nevertheless, approximately one-half of the country's households are complete nuclear households with children, but it is clear that we need to ascertain the lifecycle stage that they are in to have a better idea of their situation of relative vulnerability. Extended households that represent about one-fifth of the country's households, supply about one-fourth of the poor households, with greater risks of poverty than their nuclear homologues, although there is no definite pattern. This suggests that the strategy of grouping together to overcome poverty is not fully successful. On the other hand, composite households, which are marginal within the country's familial organization, show a slightly lower risk of poverty. This suggests that the extended households tend to contribute relatively more dependents, while the composite households contribute more potential wage earners. Among other types, only single-person households have a certain degree of presence and an incidence of poverty slightly below the national average.

Insofar as the household lifecycle variable offers greater discrimination with regard to relative vulnerability to suffering situations of deprivation, Table V.2 provides a series of indicators for poor households according to their lifecycle and places emphasis on familial households. Starting with two persons per household in the case of a young couple, household size increases systematically passing from one lifecycle stage to another until it reaches the Stabilization stage (oldest child 18 or more years of age and younger children present), where it reaches 6.2 persons per household. After this point, size diminishes until it returns to the two person empty nest. Clearly the risk of poverty is associated with family size and the possibility of mobilizing resources, thus, in early stages, as household size increases, the dependency rates also rise, and although in the stabilization stage household size continues to grow, the reduction in the incidence of poverty is based on the reduction in number of dependents per regular wage earner, which is, in fact, a better discriminator than demographic dependence.

The table also shows how, excluding extreme stages, as the poor family "ages", there is an increase in the presence of single-parent households, female-headed households, and extended and composite households. To the contrary, education of head of household is reduced to already limited levels, since it is associated with older heads of household, and therefore, those who enjoyed less educational opportunity during their childhood.

### **Lifecycle and the Evolution of Poverty**

Now we will analyze the relationship between the evolution of poverty (commented in section II and shown in Figure II.1), and the household lifecycle described thus far, for the three points during the period that we have been utilizing and that present the major changes: 1987, 1994, and 2002. Table V.3 and Figure V.3 compile and illustrate changes in incidence and distribution of poor households by family lifecycle stage.

With regards to the incidence of poverty, the “lazy S” pattern seen throughout the lifecycle stages during 2002 also occurs in the other two years under analysis (see Figure V.3). In 1987, the incidence is higher as a national average as well as for each stage in the lifecycle. This incidence drops significantly by 1994 and this reduction covers all lifecycle stages maintaining the relations among them. This suggests that the reduction in poverty responds more to factors other than demographic ones and that they can be found in the evolution of the economic structure and its repercussion on the labor market. During the period of stagnation in the incidence of poverty (1994 to 2002), it also tends to stagnate in all stages of the lifecycle, except in the intermediate stages where a slight increase in the incidence of poverty is felt (specifically in the households with a heavier dependency burden).

The evolution of the incidence of poverty by type of household shows a more dissimilar behavior (see Figure V.4). Only among the nuclear households can a pattern be seen that is stable throughout the period. This pattern is that of an increase in the incidence of poverty with the arrival of children and the loss of the spouse/partner (single-parent households). In 1987, the incidence is higher, it drops by 1994, and practically holds steady until 2002.

Returning to the household lifecycle, and in spite of this uniform behavior during both periods, there are some important changes in the relative composition of poor families in each stage of the family lifecycle during the period (see Figure V.5). Similar to what was seen for the set of familial households, poor familial households show a relative “ageing”, particularly between 1987 and 1994. The relative weight of the households in the initial stages of their lifecycle declines and the participation of the households at the mid-point and final stages increases. A relative increase can also be seen for non-familial households, particularly single-person ones. This composition effect on the households could provoke changes in the average incidence of poverty of a demographic origin.

In order to evaluate the possible impact of the modification in household composition in each stage of the family lifecycle, it is possible to take advantage of the fact that the incidence of poverty is an additive separable indicator, and to that extent it is possible to decompose the change in the indicator into three components: change in incidence inside each stage (intra effect), change in incidence due to modifications in the relative weight of the populations (population effect), and a crossover or interaction effect of the two prior effects (Ravallion and Huppi, 1991). Table V.4 presents the results from the changes in the two periods under study and with three orderings of the households. The first consists of all households including each lifecycle stage and both types of non-familial households considered. The second considers only two groups: familial and non-familial households, and the third focuses on familial households.

The general results show that the basic explanatory factor for the reduction (1987 – 1994) and the stagnation (1994 – 2002) can be found in changes that occurred within each group of households and not among them, i.e., due to factors not associated with modifications in their relative population weights. The reduction in the incidence of

poverty by almost nine percentage points between 1987 and 1994 is almost completely explained by a reduction in incidence in each household group. The changes in the population weights tend to neutralize each other and the interaction of the effects becomes marginal.<sup>11</sup> During the period of stagnation, although the increase by 0.6 percentage points is not statistically significant, it continues to be mostly explained by the effects inside each household group. The population effects take on a greater explanatory weight and would support a reduction in incidence. These results suggest that there is no evidence regarding the fact that the demographic factors associated with the changes in the relative structure of the households in the different stages of the lifecycle are an important contributor to an explanation of the stagnation of poverty seen since 1994.<sup>12</sup> This does not mean that the indirect influence of demographic trends on the characteristics and evolution of poverty should be discarded.

In spite of the fact that demographic variables, as they have been approached in this study, do not help explain the stagnation seen in the incidence, intensity, and depth of poverty, does not mean that they are not important to show the differential risk of undergoing situations of deprivation faced by households according to their lifecycle stages, and to this extent, the need to consider these variables in the definition of priorities and in the design of specific policies. As an example, Table V.5 shows a series of variables that the literature clearly relates to a greater risk of poverty and differentiates them for each household lifecycle stage. It is clear how the same household characteristic makes them more or less vulnerable to suffering situations of poverty; the risk increases in the intermediate stages of the lifecycle, i.e., when the families have the largest number of under-age children. As it is in these stages where the intergenerational reproduction of poverty is made or broken, priority attention to these families is indispensable.

## **VI. Main Conclusions**

This study allowed us to explore the methodological scope of household type and lifecycle variables in Costa Rica during the period between 1987 and 2002; we were able to validate their usefulness for describing and discriminating among different situations regarding their socio-demographic composition and vulnerability in the face of poverty.

The Multiple Purpose Household Surveys were the source of information for this study, providing excellent results, in spite of the known limitations of surveys in providing geographic disaggregation and those for specific household and population groupings.

The study revealed important modifications in household and family structure and composition during the period under study, which is associated with changes in socio-demographic dynamics within Costa Rican society, such as the reduction in fertility to

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<sup>11</sup> The interaction effect is positive if the household groups where the incidence of poverty is increasing are also increasing their relative weight. A negative sign means that the groups of households that increase their relative weight are the ones showing at the same time a reduction in the incidence of poverty.

<sup>12</sup> Similar results were found in the US case during the 90's (Iceland, 2003).

replacement levels, increased life expectancy, slow demographic ageing, and marriage patterns, among others.

This research allowed us to identify the households at greatest risk of vulnerability to poverty, particularly those with the largest number of dependent child members, as well as those with female heads.

Although the incidence of poverty declined in all household lifecycle stages during the 1987-1994 period, in the more recent period from 1994 to 2002, incidence maintained a greater presence in those stages of familial households under expansion and consolidation, where the largest proportion of poor households is concentrated as well as the largest numbers of dependent population under age 18, which exposes them to a greater vulnerability to poverty.

Notwithstanding the validity of the variables analyzed, particularly household lifecycle, for studying socio-demographic vulnerability in the face of poverty, we found no evidence to support the hypothesis that demographic conditions explain the stagnation seen in Costa Rican poverty. This does not mean that any indirect influence of demographic trends on the circumstances and evolution of poverty should be discarded outright.

These findings support the need to delve further in researching the interrelations among demographic and socio-economic factors associated with the behavior of poverty, as well as those conditions that expose households and individuals to the risk of falling into poverty, especially in the case of the most vulnerable groups.

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**Table II.1****Costa Rica: Some Household Characteristics by Poverty Stratum, 2002**

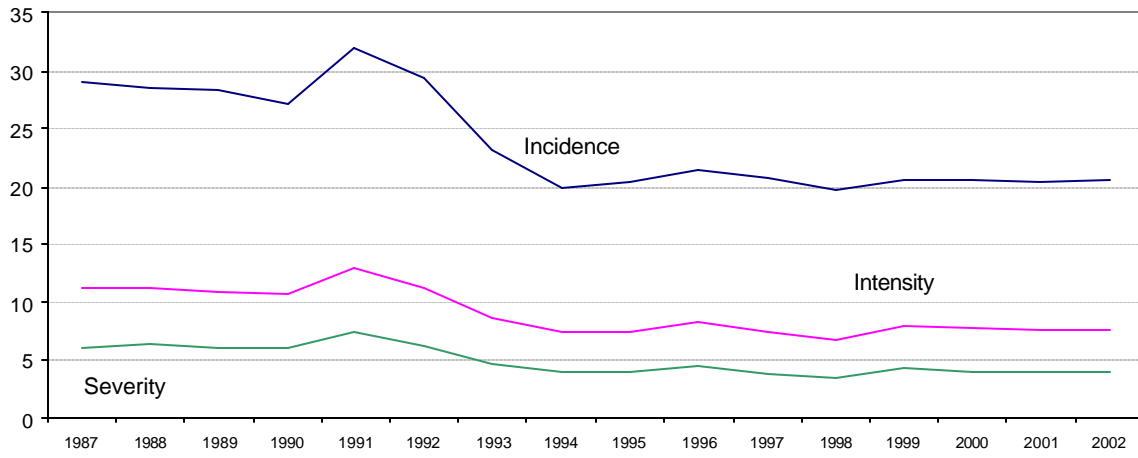
Indicator	All households	Households below the Poverty Line			Non-poor households
		All	Extreme	Slight	
Households (thousands) <sup>1</sup>	840	173	48	125	667
<i>Distribution %</i>	100.0	20.6	5.7	14.9	79.4
Population (thousands) <sup>1</sup>	3,281	771	226	546	2,510
<i>Distribution %</i>	100.0	23.5	6.9	16.6	76.5
<b>Household Structure</b>					
Persons per household	3.9	4.5	4.7	4.3	3.8
Children under 12 years	1.0	1.4	1.7	1.4	0.8
% of household members	24.5	32.5	35.2	31.4	22.1
Of working age	2.9	3.0	3.1	3.0	2.9
In labor force	1.6	1.2	1.2	1.2	1.7
Employed	1.5	1.0	0.9	1.1	1.6
Regular wage-earners	1.6	1.1	0.9	1.2	1.8
Seniors over 59 years of age	0.3	0.5	0.5	0.4	0.3
% of household members	8.4	10.2	9.8	10.3	7.9
Demographic dependency <sup>2</sup>	0.6	1.0	1.0	0.9	0.5
Dependents per employed worker	1.6	3.4	4.2	3.1	1.3
Dependents per wage-earner	1.4	3.0	4.0	2.7	1.1
<b>Household Organization</b>					
Single-parents (%)	29.9	32.9	36.9	31.4	29.1
Extended or Composite (%)	29.3	32.8	32.5	32.9	28.4
<b>Characteristics of the Head of Household</b>					
Average age	45.9	48.2	48.7	48.1	45.3
Years of formal education	7.4	4.8	4.2	5.1	8.0
Female heads of household (%)	24.7	29.9	34.5	28.1	23.4

1/ Excludes households with no or unknown income (15% of the households and 16% of the population).

2/ Children less than 15 years of age and seniors over 64 divided by the population aged 15 to 64 years.

Source: Computations by the authors on the basis of the INEC Household Surveys.

**Figure II.1**  
**Costa Rica: Recent Evolution of Poverty (Households)**



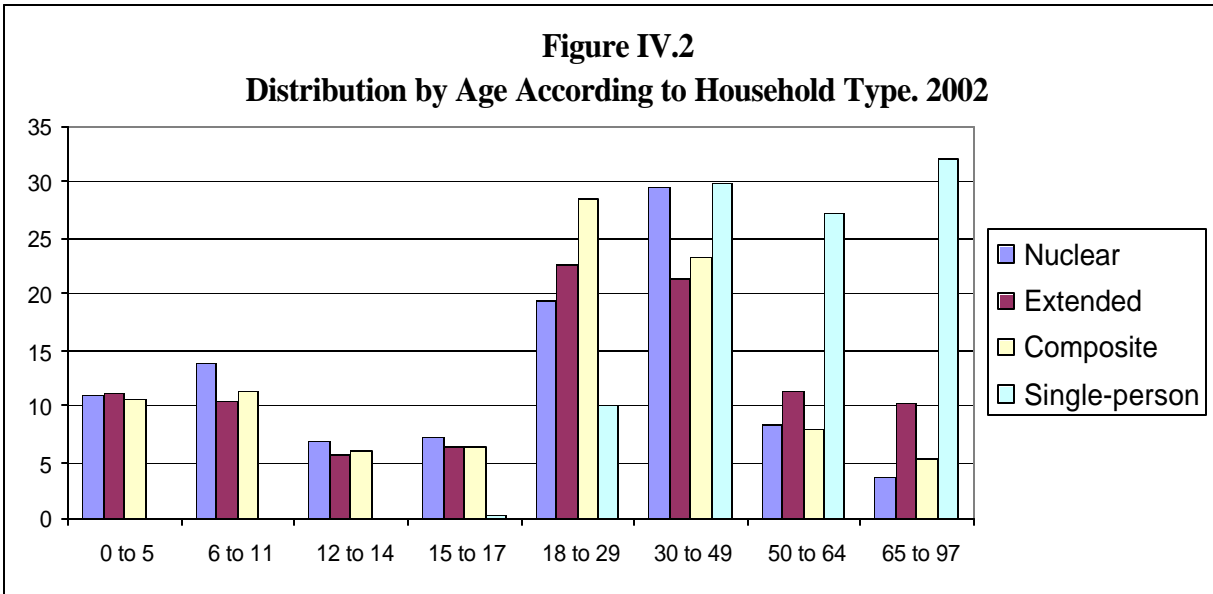
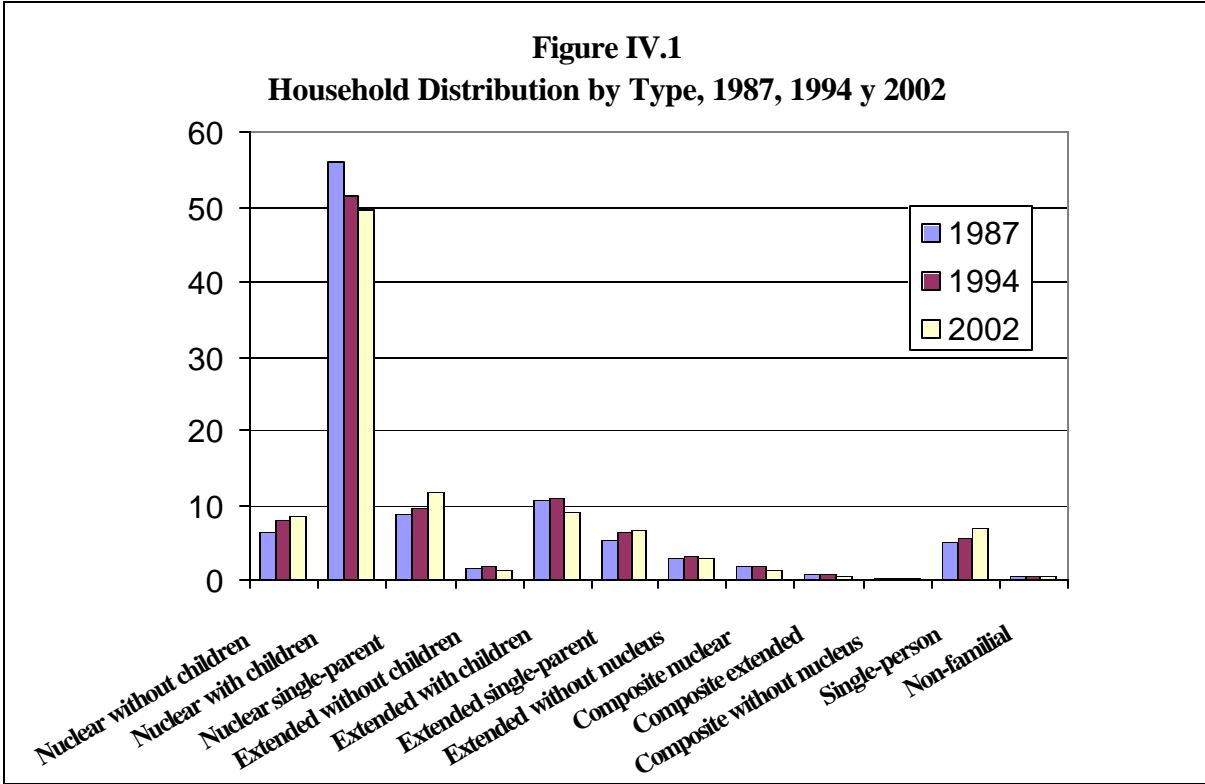
Source: INEC Household Surveye.

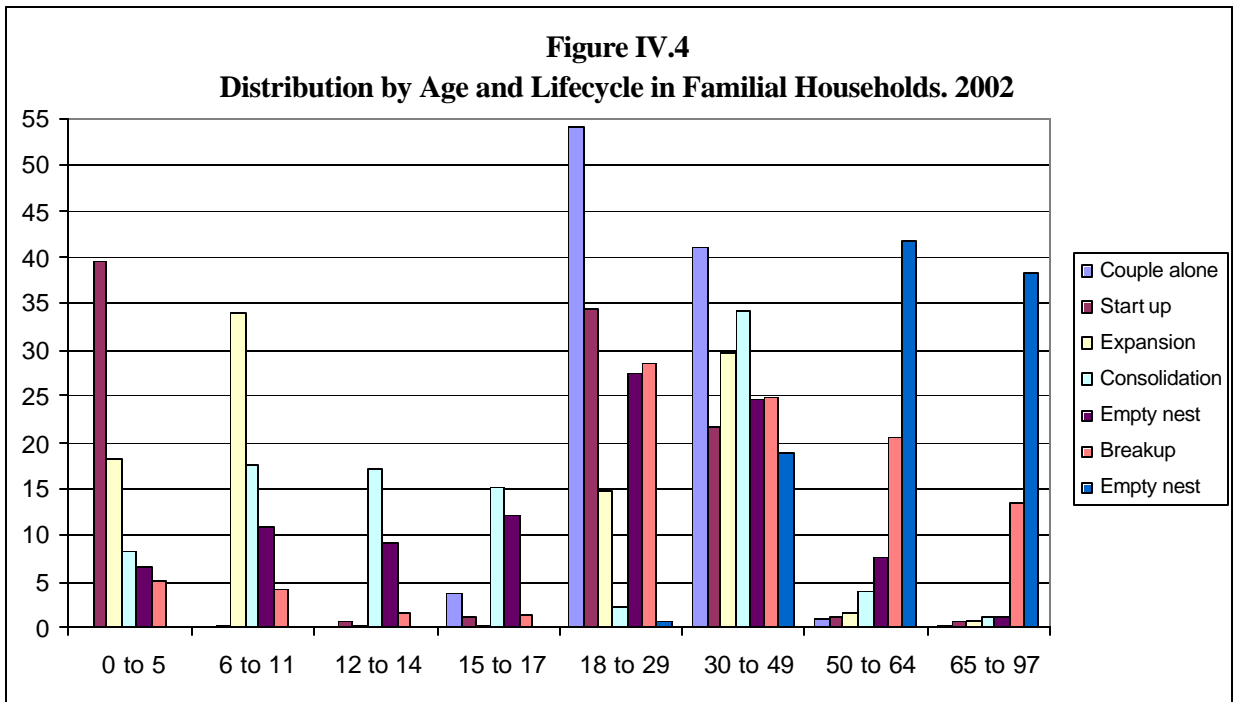
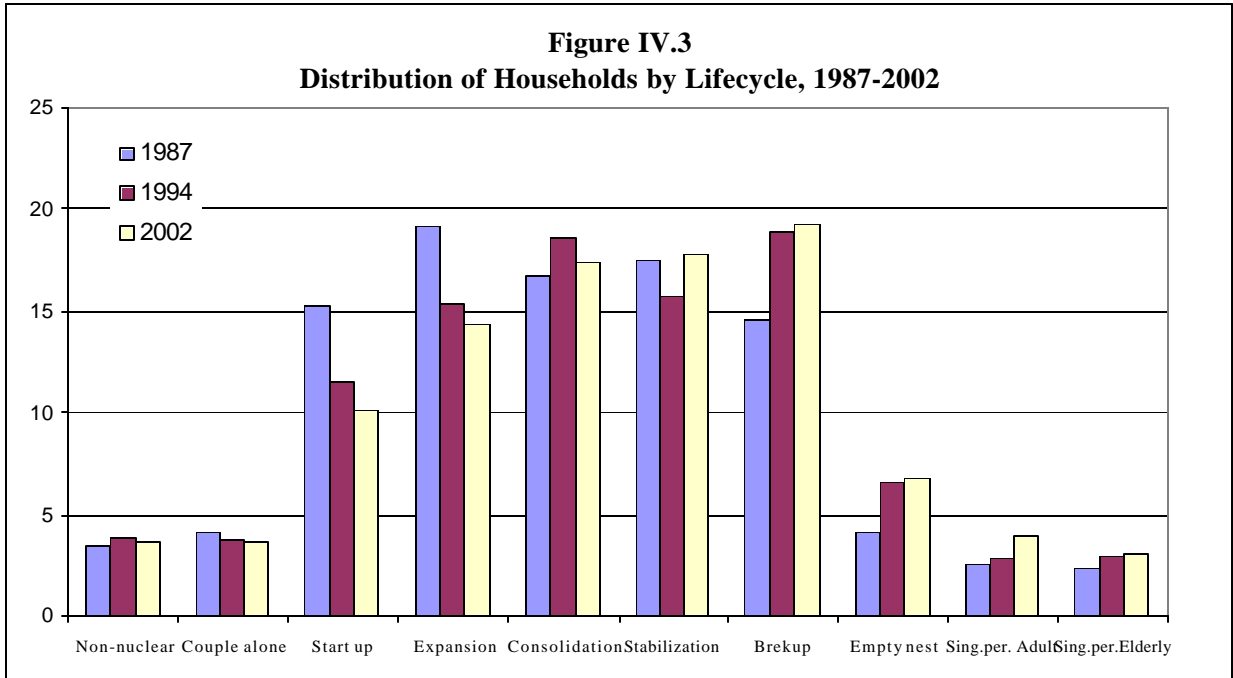
**Table III.1****Costa Rica: Indicators of Demographic Dynamics and Poverty, 1987-2002**

Year	Mortality	Fertility	Poverty
1987	76.3	3.3	29.0
1988	76.6	3.3	28.4
1989	76.5	3.3	28.3
1990	76.9	3.2	27.1
1991	76.6	3.1	31.9
1992	76.6	3.0	29.4
1993	76.7	3.0	23.2
1994	76.4	2.9	20.0
1995	76.2	2.8	20.4
1996	76.8	2.7	21.5
1997	76.9	2.6	20.7
1998	77.0	2.5	19.7
1999	77.3	2.5	20.6
2000	77.7	2.4	20.6
2001	77.7	2.3	20.3
2002	78.5	2.1	20.6

Life expectancy at birth, Total Fertility Rate, and percent of poor households.

Sources: EHPM, INEC, and Actualidad Demográfica en <http://ccp.ucr.ac.cr/>





**Table IV.1**  
**Costa Rica: Relative Distribution of Households and Household Size**  
**by Type. 1987 - 1994 - 2002**

Household Type	Relative distribution			Household members		
	1987	1994	2002	1987	1994	2002
Nuclear without children	6.4	8.0	8.6	2.0	2.0	2.0
Nuclear with children	56.1	51.4	49.7	4.8	4.6	4.4
Nuclear single-parent	8.7	9.6	11.8	3.8	3.3	3.1
Extended without children	1.6	1.8	1.4	3.6	3.5	3.4
Extended with children	10.7	10.9	9.0	6.7	6.4	6.1
Extended single-parent	5.2	6.3	6.8	5.5	5.1	5.0
Extended without nucleus	2.8	3.1	2.9	3.3	3.2	2.9
Composite nuclear	2.0	1.8	1.3	5.8	4.9	5.0
Composite extended	0.9	0.7	0.6	7.5	7.2	7.0
Composite without nucleus	0.1	0.2	0.2	5.0	3.9	5.1
Single-person	4.9	5.7	7.0	1.0	1.0	1.0
Non-familial	0.5	0.5	0.5	2.6	2.9	2.6
Total	100.0	100.0	100.0	4.6	4.3	3.9

Source: Computations by the authors on the basis of the EHPM from INEC.



**Table IV.2****Costa Rica: Relative Distribution of Households by Gender of Head of Household, According to Type of Household.  
1987 - 1994 - 2002**

Type of household	1987		1994		2002		Percent female-headed households		
	Males	Females	Males	Females	Males	Females	1987	1994	2002
Nuclear without children	7.6	0.3	9.9	0.4	10.8	2.1	0.9	1.0	6.0
Nuclear with children	66.9	3.0	63.2	3.2	64.1	6.2	0.9	1.2	3.1
Nuclear single-parent	1.4	45.1	1.6	42.5	1.4	43.1	87.0	86.8	90.8
Extended without children	1.8	0.5	2.1	0.4	1.7	0.5	5.3	4.4	8.1
Extended with children	12.6	1.4	13.0	2.2	11.3	2.2	2.3	4.0	6.2
Extended single-parent	1.0	25.9	1.3	26.5	0.9	24.5	83.5	83.1	90.4
Extended without nucleus	2.0	6.9	2.1	7.3	1.7	6.7	41.6	46.3	56.3
Composite nuclear	2.1	1.4	1.9	1.7	1.5	0.9	11.5	18.2	16.8
Composite extended	0.8	1.3	0.6	1.1	0.5	1.0	24.7	30.5	38.2
Composite without nucleus	0.1	0.5	0.1	0.2	0.2	0.4	64.7	25.6	45.9
Single-person	3.5	12.3	3.9	13.2	5.4	11.7	41.7	45.5	41.7
Non-familial	0.3	1.4	0.3	1.3	0.4	0.8	50.2	50.0	38.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	16.8	19.7	25.0

Source: Computations by the authors on the basis of the INEC Multiple Purpose Household Surveys.

**Table IV.3**  
**Costa Rica: Relative Distribution and Household Size, According to Household Lifecycles.**  
**1987-1994-2002**

Household Lifecycle	Relative distribution			Members per household		
	1987	1994	2002	1987	1994	2002
Couple alone	4.1	3.8	3.6	2.0	2.3	2.0
Start-up	15.2	11.5	10.1	3.7	3.8	3.5
Expansion	19.2	15.3	14.3	4.8	4.6	4.2
Consolidation	16.8	18.6	17.4	5.3	5.1	4.6
Stabilization	17.5	15.8	17.8	6.6	6.0	5.6
Breakup	14.6	18.9	19.2	4.7	4.3	4.0
Empty nest	4.2	6.6	6.8	2.0	2.4	2.0
Non-nuclear	3.5	3.8	3.7	4.2	3.1	3.6
Single-person adult	2.6	2.8	3.9	1.0	1.0	1.0
Single-person elderly	2.4	2.9	3.1	1.0	1.0	1.0
Total	100.0	100.0	100.0	4.6	4.3	3.9

Source: Computations by the authors on the basis of the EHPM from INEC.

**Table IV.4**  
**Costa Rica: Relative Distribution of Households by Gender of Head of Household, According to Lifecycle.**  
**1987 - 1994 - 2002**

Household Lifecycle	1987		1994		2002		Percent female-headed households		
	Males	Females	Males	Females	Males	Females	1987	1994	2002
Couple alone	4.9	0.3	4.7	0.1	4.5	0.9	1.2	0.4	6.4
Start-up	17.5	4.1	13.7	2.5	12.3	3.6	4.5	4.4	8.9
Expansion	21.0	10.3	16.8	9.2	16.2	8.8	9.0	11.8	15.4
Consolidation	17.0	15.5	19.2	16.4	18.2	15.2	15.6	17.3	21.8
Stabilization	17.2	19.2	15.4	17.4	17.2	19.5	18.5	21.8	27.3
Breakup	11.7	28.9	15.8	31.7	15.5	30.6	33.3	33.0	39.7
Empty nest	4.9	0.7	8.0	0.7	8.5	1.7	2.7	2.2	6.2
Non-nuclear	2.4	8.8	2.6	8.8	2.3	7.9	43.0	45.7	53.2
Single -person adult	2.2	4.3	2.3	5.1	3.5	5.1	27.9	35.2	32.6
Single -person elderly	1.2	8.0	1.6	8.1	1.9	6.6	56.7	55.9	53.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	16.8	19.7	25.0

Source: Computations by the authors on the basis of the INEC Multiple Purpose Household Surveys.

**Table V.1**  
**Costa Rica: Incidence and Distribution of Poverty by Lifecycle and Type of Household. 2002**

Indicator	Incidence of poverty			Distribution of poor households		
	Total	Extreme	Slight	Total	Extreme	Slight
<b>Household lifecycle</b>						
All households	20.6	5.7	14.9	100.0	100.0	100.0
Familial households	20.8	6.0	14.8	89.8	93.6	88.4
Couple alone	3.3	0.5	2.8	0.6	0.3	0.7
Start-up	15.3	3.8	11.5	8.0	7.2	8.3
Expansion	25.4	7.7	17.7	18.5	20.3	17.8
Consolidation	27.7	7.7	20.1	24.1	24.3	24.1
Stabilization	19.5	4.9	14.5	16.3	15.0	16.8
Breakup	16.8	6.3	10.5	14.2	19.4	12.2
Empty nest	23.9	5.9	18.0	8.1	7.3	8.4
Non-familial households	19.3	3.3	15.9	10.2	6.4	11.6
Non-nuclear	21.7	6.5	15.2	3.7	4.0	3.6
Single-person	18.1	1.8	16.3	6.5	2.3	8.0
Adult	8.3	2.0	6.2	1.6	1.5	1.7
Elderly	30.2	1.5	28.7	4.8	0.9	6.3
<b>Type of household</b>						
All households	20.6	5.7	14.9	100.0	100.0	100.0
Nuclear households	19.6	5.4	14.2	67.2	67.5	67.1
Without children	14.5	3.7	10.8	6.3	5.9	6.5
With children	19.7	5.0	14.7	47.5	43.6	49.0
Single-parent	22.9	8.5	14.4	13.4	18.1	11.6
Extended households	25.7	8.3	17.5	24.3	28.2	22.8
Without children	30.1	6.4	23.7	2.2	1.7	2.4
With children	23.8	7.2	16.5	10.0	11.0	9.6
Single-parent	28.2	10.4	17.8	8.8	11.8	7.7
Non-nuclear	23.8	7.5	16.3	3.2	3.7	3.0
Composite households	18.9	4.5	14.4	1.8	1.6	1.9
Nuclear	16.4	2.1	14.3	1.0	0.4	1.2
Extended	22.4	11.1	11.2	0.6	1.1	0.4
Non-nuclear	24.6	0.0	24.6	0.2	0.0	0.3
Other households	17.5	1.9	15.6	6.7	2.7	8.3
Single-person	18.1	1.8	16.3	6.5	2.3	8.0
Non-familial	10.2	3.5	6.7	0.3	0.3	0.2

Source: Computations by the authors on the basis of the INEC Household Surveys.

**Table V.2****Costa Rica: Some Characteristics of Poor Households by Family Lifecycle Stage. 2002**

Indicator	Poor households	Familial households								Non-familial households
		Total	Couple alone	Start-up	Expansion	Consolidat.	Stabilizat.	Breakup	Empty nest	
Poor households (thousands) <sup>1</sup>	173	156	1	14	32	42	28	25	14	18
Distribution %	100.0	89.8	0.6	8.0	18.5	24.1	16.3	14.2	8.1	10.2
Incidence of poverty	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Poor population (thousands) <sup>1</sup>	771	734	2	50	151	219	175	108	28	37
Distribution %	100.0	95.2	0.3	6.5	19.6	28.3	22.7	14.0	3.6	4.8
Incidence of poverty	23.5	23.6	3.4	16.1	28.4	31.2	21.8	18.6	23.9	22.2
<b>Household structure</b>										
Persons per household	4.5	4.7	2.0	3.6	4.7	5.2	6.2	4.4	2.0	2.1
Children under 12 years	1.4	1.6	0.0	1.6	2.8	1.7	1.5	0.8	0.0	0.3
Working age	3.0	3.1	2.0	2.0	1.9	3.5	4.7	3.6	2.0	1.8
In labor force	1.2	1.3	1.4	1.1	1.0	1.4	2.0	1.2	0.4	0.4
Employed	1.0	1.1	1.1	1.0	1.0	1.2	1.6	0.9	0.4	0.3
Regular wage-earners	1.1	1.2	1.1	1.0	1.0	1.3	1.7	1.1	0.7	0.4
Demographic dependency <sup>2</sup>	1.0	0.9	0.0	0.8	1.5	1.1	0.6	0.8	1.5	1.3
Dependents per employed worker	3.4	3.3	0.9	2.6	3.8	3.2	2.9	3.9	3.7	6.1
Dependents per wage-earner	3.0	3.0	0.9	2.5	3.7	3.2	2.8	2.9	1.9	3.7
<b>Household organization</b>										
Single-parent (%)	32.9	25.3	0.0	8.9	18.6	23.0	33.3	53.6	0.0	100.0
Extended or composite (%)	32.8	25.2	69.5	10.0	8.7	14.6	40.1	55.0	24.2	100.0
<b>Characteristics of the head of household</b>										
Average age	48.2	46.3	35.8	29.9	34.3	40.8	47.1	67.4	68.7	65.0
Years of formal education	4.8	5.0	4.7	5.9	6.0	5.7	5.0	3.2	2.9	3.5
Female heads of household (%)	29.9	26.3	0.0	12.9	18.6	25.9	35.0	47.0	6.5	61.8

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1/ Excludes households with no or unknown income (15% of the households and 16% of the population).

2/ Those under 15 years and over 64 years divided by the population 15 to 64 years.

Source: Computations by the authors on the basis of the INEC Multiple Purpose Household Surveys.

**Table V.3**  
**Costa Rica: Evolution of Poor Households by Lifecycle and Type of Household.**  
**1987 - 1994 - 2002**

Indicator	Total incidence of poverty			Distribution of poor households		
	1987	1994	2002	1987	1994	2002
<b>Household lifecycle</b>						
All households	29.0	20.0	20.6	100.0	100.0	100.0
Familial households	29.0	20.1	20.8	91.4	91.1	89.8
Couple alone	8.9	5.5	3.3	1.3	1.1	0.6
Start-up	24.2	16.3	15.3	13.8	10.5	8.0
Expansion	35.3	24.4	25.4	24.7	19.5	18.5
Consolidation	38.0	25.7	27.7	22.4	24.0	24.1
Stabilization	26.3	17.4	19.5	14.5	13.1	16.3
Breakup	22.4	16.9	16.8	10.1	14.6	14.2
Empty nest	31.8	24.6	23.9	4.6	8.4	8.1
Non-familial households	29.5	18.7	19.3	8.6	8.9	10.2
Non-nuclear	30.4	19.0	21.7	3.8	3.5	3.7
Single-person	28.8	18.6	18.1	4.8	5.4	6.5
Adult	12.5	4.1	8.3	1.1	0.6	1.6
Elderly	48.7	34.0	30.2	3.7	4.8	4.8
<b>Type of household</b>						
All households	29.0	20.0	20.6	100.0	100.0	100.0
Nuclear households	29.0	19.7	19.6	71.5	69.0	67.2
Without children	17.7	14.3	14.5	4.0	6.0	6.3
With children	30.0	20.1	19.7	58.2	52.3	47.5
Single-parent	30.9	22.2	22.9	9.3	10.7	13.4
Extended households	29.2	22.0	25.7	20.5	23.2	24.3
Without children	27.0	33.4	30.1	1.6	3.2	2.2
With children	28.5	20.4	23.8	10.3	10.5	10.0
Single-parent	29.7	21.0	28.2	5.3	6.2	8.8
Non-nuclear	32.5	22.3	23.8	3.3	3.4	3.2
Composite households	30.0	17.9	18.9	2.9	2.3	1.8
Nuclear	27.2	16.8	16.4	1.8	1.6	1.0
Extended	35.0	24.2	22.4	1.0	0.7	0.6
Non-nuclear	44.2	10.3	24.6	0.1	0.1	0.2
Other households	27.6	17.3	17.5	5.1	5.4	6.7
Single-persons	28.9	18.6	18.1	4.8	5.4	6.5
Non-familial	15.6	1.6	10.2	0.3	0.0	0.3

Source: Computations by the authors on the basis of the INEC Multiple Purpose Household Surveys.

**Table V.4**  
**Costa Rica: Breakdown of the Changes in Incidence of Poverty by Stage on the Household Lifecycle**

Effects	All households		Familial/non-familial		Familial households	
	1994/87	2002/94	1994/87	2002/94	1994/87	2002/94
Absolute changes 1	-9.05	0.65	-9.05	0.65	-8.88	0.68
Effects						
Intra	-9.04	0.67	-9.18	0.70	-8.99	0.65
Population	0.01	-0.02	0.01	-0.12	-0.06	-0.02
Interaction	-0.02	0.00	0.12	0.07	0.17	0.06
Relative distribution						
Effects	100.0	100.0	100.0	100.0	100.0	100.0
Intra	99.8	103.3	101.5	108.3	101.3	94.2
Population	-0.1	-3.0	-0.1	-18.7	0.7	-3.1
Interaction	0.2	-0.3	-1.3	10.4	-2.0	8.9

1/ Change on percentage points.

Source: Computations by the authors on the basis of the EHPM from INEC.

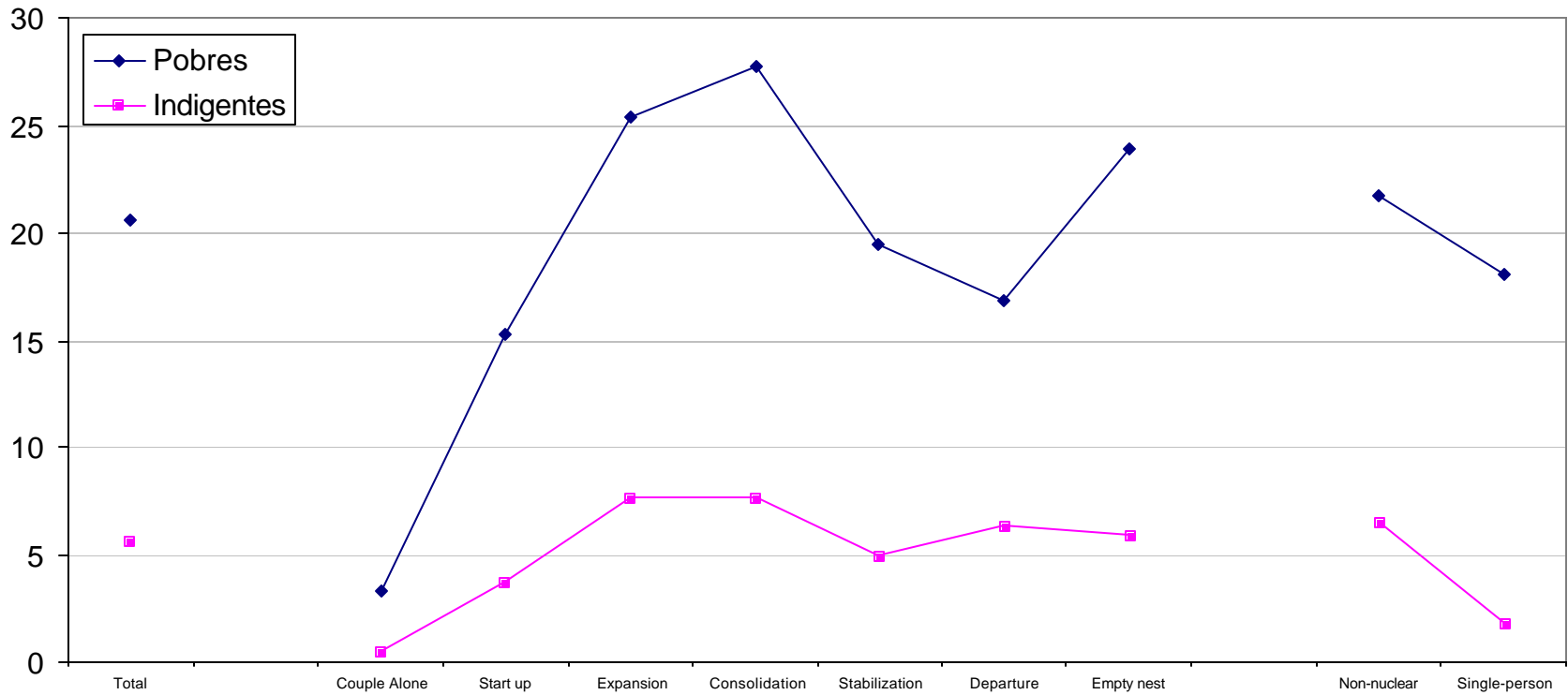


Table V.5  
Costa Rica: Incidence of Poverty by Family Lifecycle and Characteristics of the Head of Household.  
2002

Indicator	Total	Familial households							Non-familial households	
	Households	Total	Couple alone	Start-up	Expansion	Consolidat.	Stabilizat.	Breakup		Empty nest
Educational level	20.6	20.8	3.4	15.3	25.4	27.7	19.4	16.9	24.1	19.2
Incomplete primary	37.1	37.2	7.2	32.1	51.1	47.1	36.6	30.4	38.5	37.0
Completed primary	21.6	22.5	4.8	21.1	31.0	32.4	18.3	11.4	17.7	11.8
Secondary	13.7	14.1	3.6	9.7	17.5	23.4	13.8	6.7	3.7	9.2
Higher	3.4	3.4	0.0	3.2	5.2	4.0	4.5	0.8	2.8	3.7
Household type	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Nuclear	19.6	19.6	1.1	15.5	26.0	27.1	15.8	12.7	22.5	0.0
Non-nuclear	23.1	25.3	21.2	13.5	20.7	31.8	29.8	22.9	29.6	19.3
Wage-earners in the household	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Without wage-earners	70.5	70.7		42.8	66.9	76.0	53.0	85.2	69.9	70.1
With 1 wage-earner	26.3	29.3	6.4	19.8	32.4	33.3	40.7	30.8	24.4	9.3
With 2 or more wage-earners	9.5	9.7	0.6	4.9	6.4	17.4	12.1	7.0	5.7	4.9
Occupational status	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Employed	16.7	17.6	2.1	14.1	23.9	24.7	16.3	8.8	13.6	5.9
Not employed	34.5	33.6	30.5	39.9	47.2	57.4	36.1	25.1	36.8	38.1
Gender	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Male	19.2	19.7	3.6	14.7	24.4	26.5	17.6	15.0	23.8	13.4
Female	24.9	24.5	0.0	21.3	31.0	32.1	24.5	19.5	24.8	26.4
Zone of residence	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Urban	17.3	17.2	3.6	13.1	22.4	22.2	16.0	14.3	18.6	18.0
Rural	25.4	25.8	3.1	17.7	29.3	34.2	24.6	22.2	31.5	21.3
Region of residence	20.6	20.8	3.3	15.3	25.4	27.7	19.5	16.8	23.9	19.3
Central	15.9	15.8	3.7	11.2	20.4	20.1	14.3	13.1	20.7	16.1
Rest of the Country	28.5	29.1	2.8	20.9	33.4	38.0	30.1	25.4	28.6	23.9

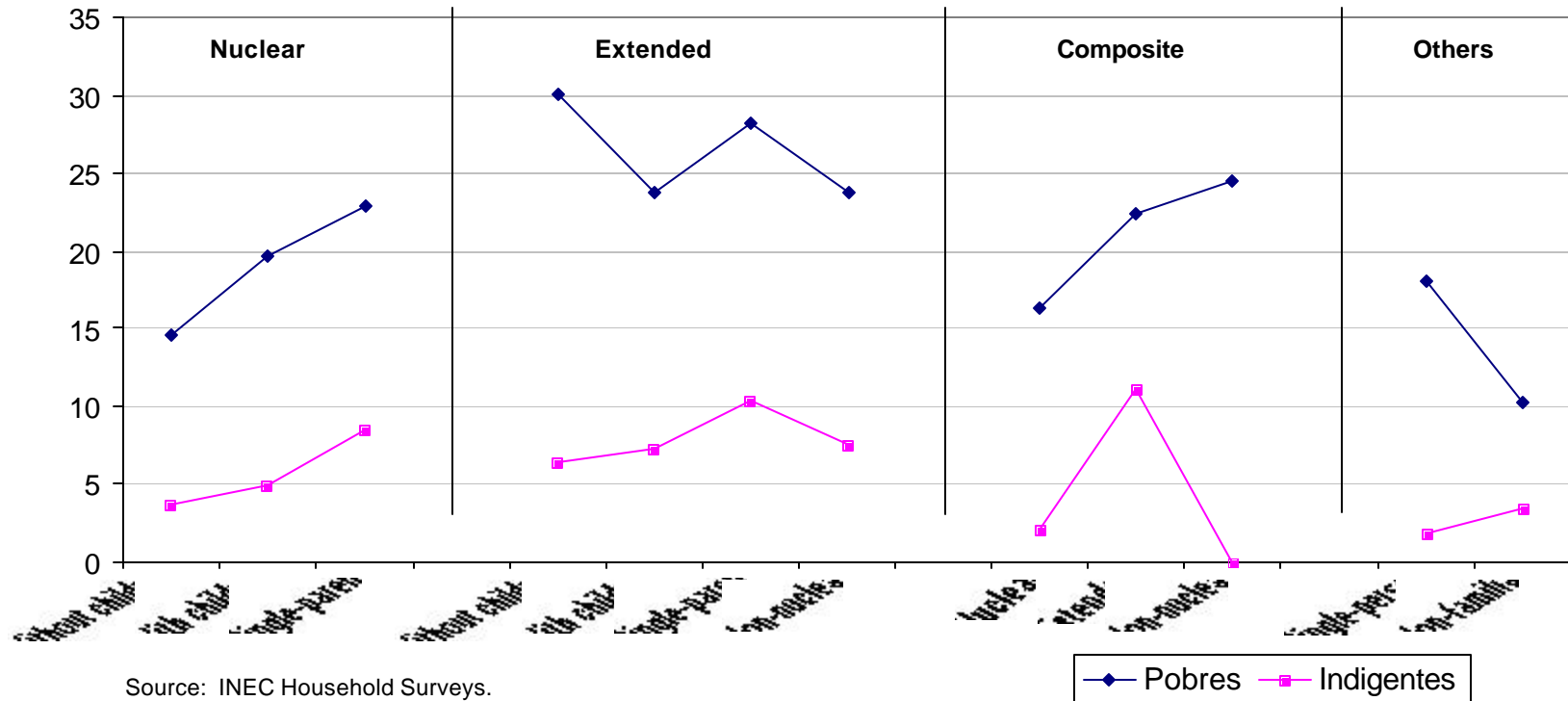
Source: Computations by the authors on the basis of the INEC Multiple Purpose Household Surveys.

**Figure V.1**  
**Costa Rica: Proportion of Poor Households by Lifecycle Stage. 2002**

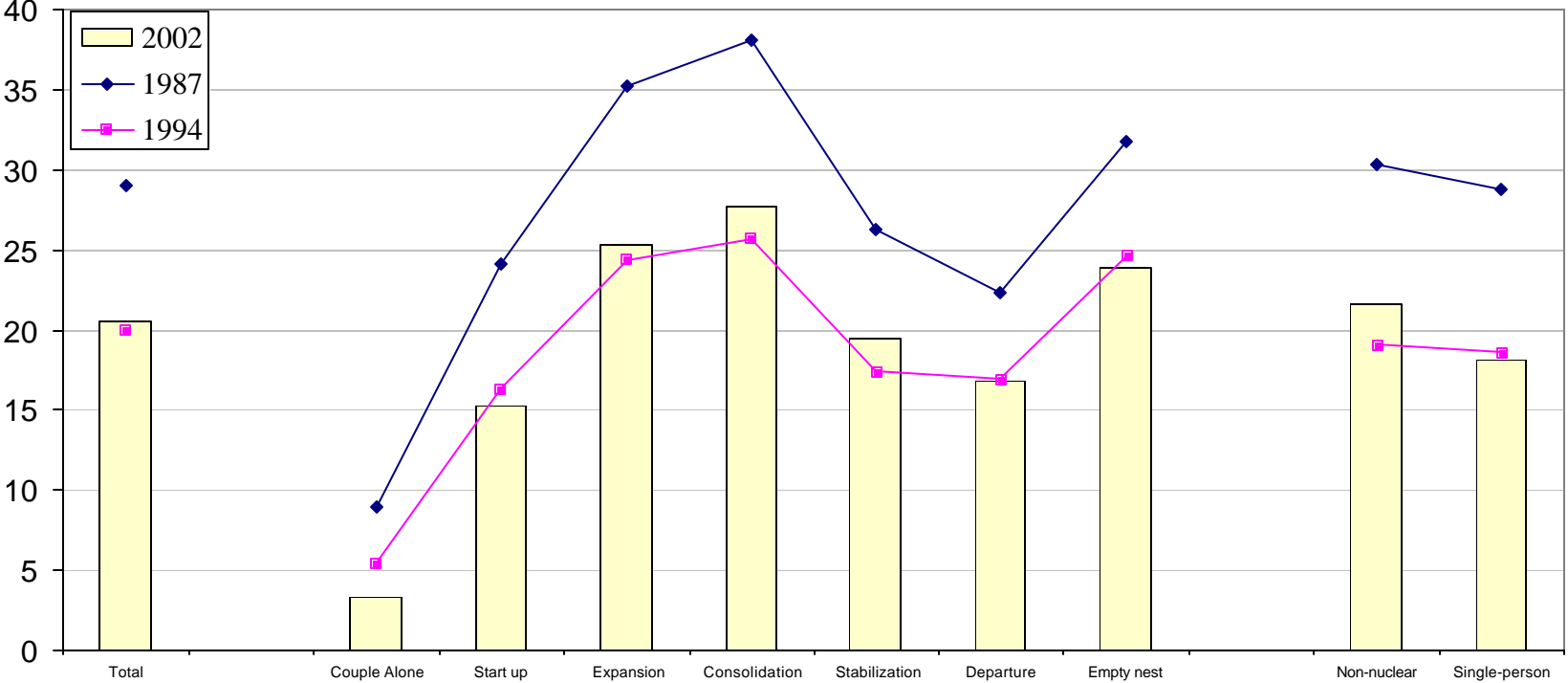


Source: INEC Household Surveys.

**Figure V.2**  
**Costa Rica: Proportion of Poor Households by Household Type. 2002**

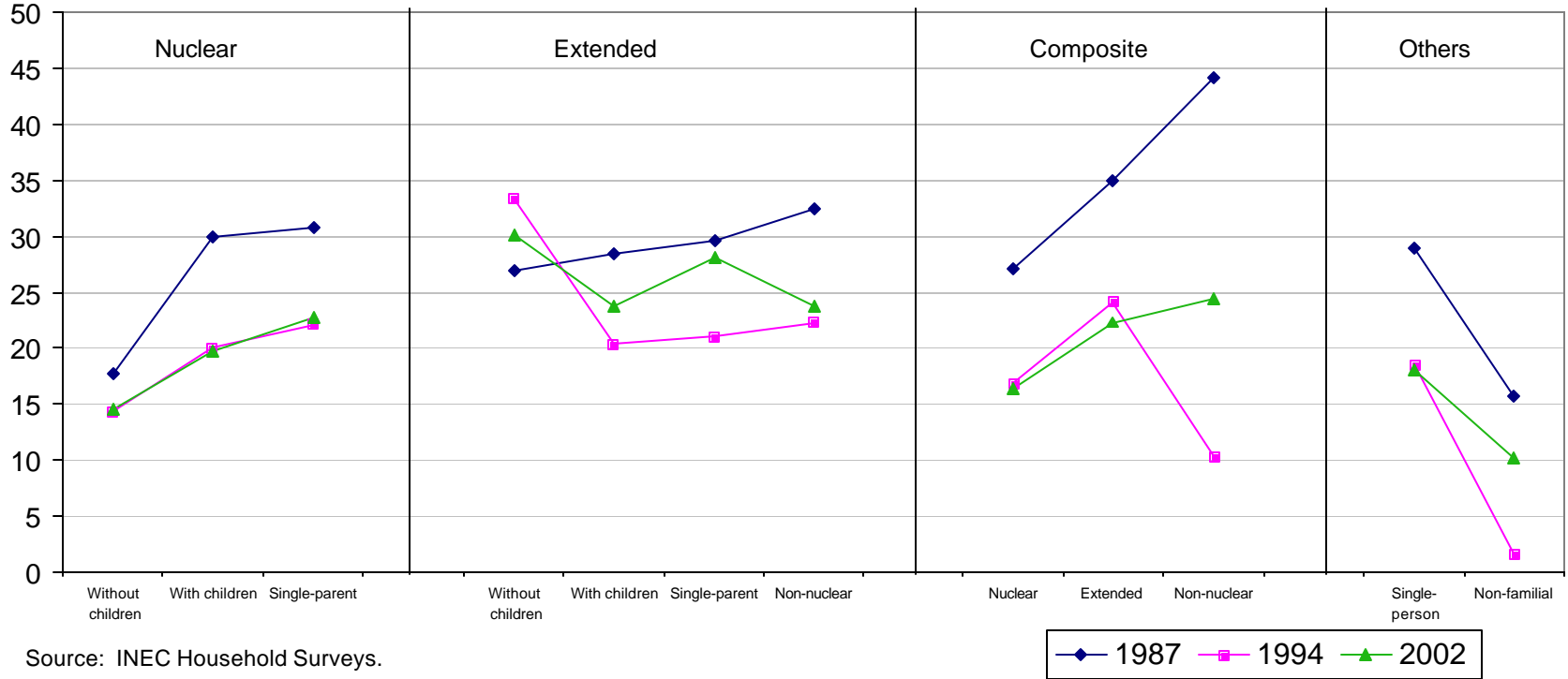


**Figure V.3**  
**Costa Rica: Proportion of Poor Households by Lifecycle and Year**

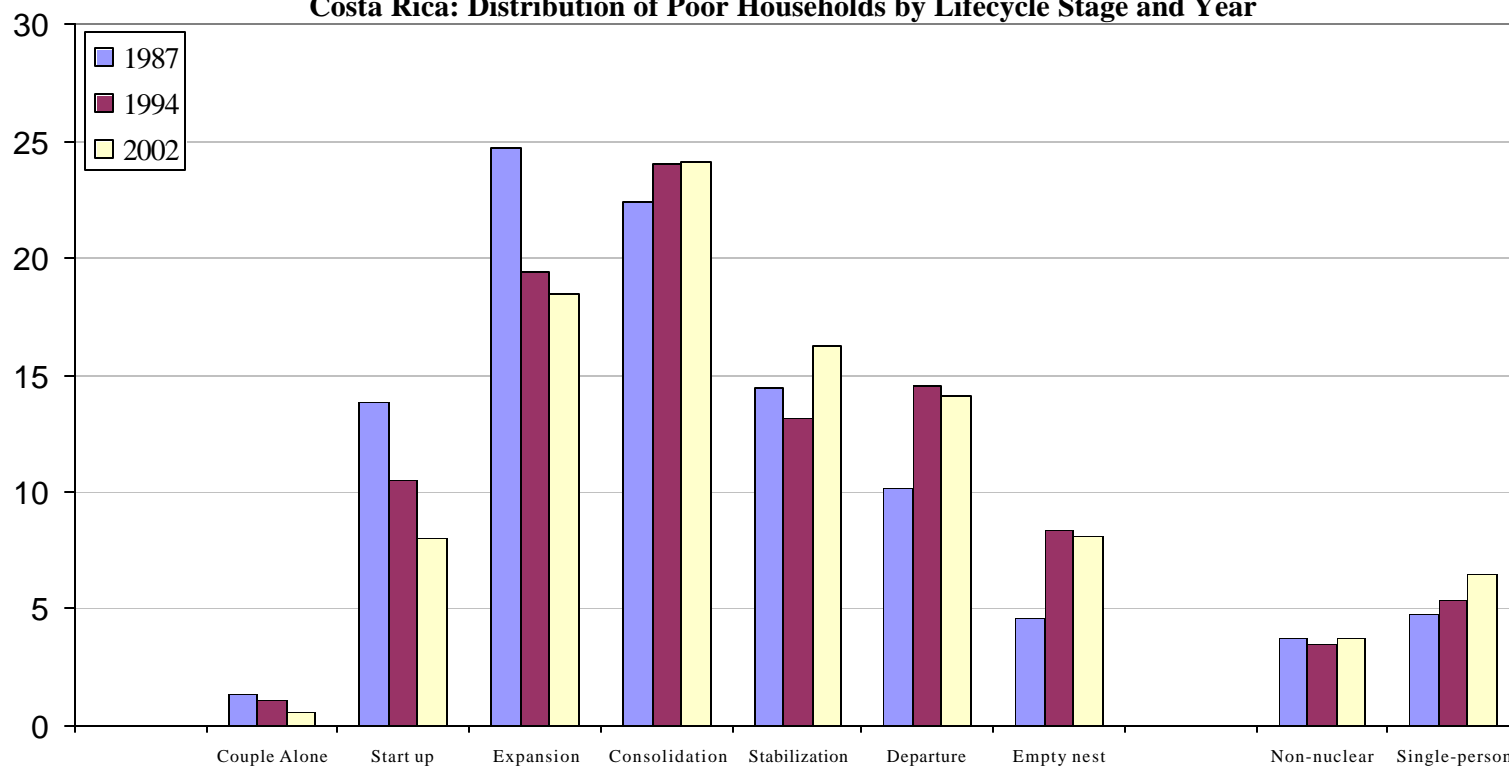


Source: INEC Household Surveys.

**Figure V.4**  
**Costa Rica: Proportion of Poor Households by Household Type and Year**



**Figure V.5**  
**Costa Rica: Distribution of Poor Households by Lifecycle Stage and Year**



Source: INEC Household Surveys.