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An assessment of poverty statistics comparability

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Abstract

Monitoring progress towards SDG 1 (No Poverty) in the Caribbean has been hindered by a lack of internationally comparable data on monetary poverty. This is due, partly, to the relative infrequency of household surveys of living standards, but also to the fact that poverty estimates produced from existing surveys are generally not comparable across countries or across time. While Caribbean countries use the same 'cost of basic needs' approach and similar methods to measure poverty, inconsistencies in survey design and the precise methods used to define and update poverty lines, mean that national estimates cannot be relied upon to provide a coherent Caribbean-wide picture of trends in monetary poverty. This study provides a comparative analysis of the methods used to produce poverty estimates in the Caribbean, discusses the need for harmonised estimates, and includes some analysis of the challenges involved in analysing poverty across countries of different income levels. It closes with recommendations for improved harmonization of national estimates and the production and use of harmonized estimates by international organizations, which could be used to monitor trends and inform efforts to reduce poverty at subregional, regional and global levels.

Introduction

Policymakers seeking to address poverty in the Caribbean face an immediate problem regarding the availability of poverty estimates and their comparability over time and across countries. Most Caribbean countries have produced at least occasional estimates of monetary poverty although the frequency of statistics and a general lack of comparability among them have made it difficult to produce a coherent analysis of poverty and inequality across the Caribbean. Furthermore, there has been a decline in the availability of statistics on poverty over the last fifteen years. Only the Planning Institute and Statistical Institute of Jamaica (PIOJ and STATIN) produce annual estimates of monetary poverty (excepting census years and 2020 when, due to COVID-19, no estimates were produced).

Poverty assessments depend on household surveys and so the availability of statistics on poverty is determined by the frequency of these surveys. In the Caribbean, poverty measurement has been based on surveys of living conditions (SLC), household budget surveys (HBS), joint SLC-HBSs or similar surveys. SLCs collect a wider range of information, including about housing, health, education and labour, while HBSs focus more on income and detailed expenditure data, but both can be used to estimate poverty. There have been 71 national poverty assessments (or official estimates of national poverty rates) in the Caribbean since 1990 (table 1). Of these, 31 were carried out in Jamaica. Setting aside Jamaica, of the remining 40 poverty assessments, 10 were carried out in the 1990s, 20 in the 2000s, 9 in the 2010s and just 1 has been published for the 2020s so far.

Several factors have contributed to the relative paucity of data over recent years. During the 1990s and 2000s, the Country Poverty Assessment (CPA) Programme was coordinated by the Caribbean Development Bank (CDB), which supported many national poverty assessments. This programme was paused, redesigned, and then relaunched in 2016, in collaboration with the Organisation of Eastern Caribbean States (OECS), as the Enhanced County Poverty Assessment (eCPA) Programme. The eCPA Programme now seeks to measure not only monetary poverty but also multidimensional poverty. However, the pause, re-design and re-launch of the programme seemed to lead to a loss of momentum. This problem was then compounded by the COVID-19 pandemic which disrupted statistical activities, including the 2020 round of population and housing censuses, with knock-on effects for surveys of living conditions and poverty assessments. During the 2010s, there were also two countries in which surveys of living conditions were undertaken, but the results were not officially published, which further worsened the data gap.

Table 1
Household surveys used for official estimates of poverty in the Caribbean, 1990–2023

		Survey	Dates			Survey	Dates
Anguilla	2002	SLC	Jul 02	Jamaica	2002	SLC	May 02–Jul 02
	2008/09	SLC-HBS	..	(continued)	2003	SLC	May 03–Jul 03
					2004	SLC	May 04–Jul 04
Antigua and Barbuda	2005	SLC-HBS	Aug 05–Mar 06		2005	SLC	..
					2006	SLC	May 06–Jul 06
Bahamas (The)	2001	SLC	..		2007	SLC	May 07–Jul 07
	2013	HES	..		2008	SLC	Aug 08–Feb 09
					2009	SLC	May 09–Jul 09
Barbados	1997	LFS-SLC	Aug 96–Jun 97		2010	SLC	May 10–Aug 10
	2010	SLC	..		2012	SLC	Jun 12–Nov 12
	2016/17	SLC	Feb 16–Jan 17		2013	SLC	Jul 13–Oct 13
					2014	SLC	Jun 14–Nov 14
Belize	1996	SLC	..		2015	SLC	..
	2002	LSMS	Feb 02–Mar 02		2016	SLC	Jul 16–Oct 16
	2009	LSMS	Apr 09–May 09		2017	SLC	..
	2018/19	HBS	May 18–Feb 19		2018	SLC	..
					2019	SLC	May 19–Jan 20
British Virgin Islands	2002	SLC	Jul 02–Sep 02		2021	SLC	Jun 21–Oct 21
					2023	SLC	..
Cayman Islands	2007	SLC-HBS	..				
				Montserrat	2008/09	SLC	..
Dominica	2002	SLC	Jul 02–Aug 02				
	2008/09	SLC-HBS	Nov 08–May 09	Saint Kitts and Nevis	2000	SLC	..
					2007	SLC-HBS	Jan 07–Aug 07
Grenada	1998	SLC	Jan 98–Jun 98				
	2007/08	SLC-HBS	Nov 07–May 08	Saint Lucia	1995	SLC	..
	2018/19	SLC-HBS	May 18–Apr 19		2006	SLC-HBS	Aug 05–Feb 06
					2016	SLC-HBS	Nov 15–Jul 16
Guyana	1993	LSMS	Jan 93–Jul 93				
	1999	SLC	..	Saint Vincent and the Grenadines	1996	HBES	..
	2006	HIES	..		2008	SLC-HBS	..
Jamaica	1990	SLC	..	Suriname	2000[a]	HBS	..
	1991	SLC	..		2008[a]	HBS	..
	1992	SLC	..		2013/14	HBS	Nov 13–Aug 14
	1993	SLC	..		2016/17	SLC	Oct 16–Sep 17
	1994	SLC	..		2022	SLC	Jan 22–Dec 22
	1995	SLC	..				
	1996	SLC	May 96–Aug 96	Trinidad and Tobago	1992	SLC	May 92–Jun 92
	1997	SLC	May 97–Jul 97		1997/98	HBS	..
	1998	SLC	May 98–Jul 98		2005	SLC	Jun 05–Jul 05
	1999	SLC	May 99–Jul 99				
	2000	SLC	May 00–Jul 00	Turks and Caicos Islands	1999	SLC	Jan 99–Jun 99
	2001	SLC	May 01–Jul 01		2012	SLC	..

Source: Authors' compilation.
Note: An SLC (Survey of Living Conditions) is a survey of household's living standards, including housing, health, education, labour, income and expenditure, and is used to measure poverty, inequality, and wellbeing. An HBS (Household Budget Survey) focuses more on income and detailed expenditure data. It is used to update the Consumer Price Index but can also be used to estimate poverty and can be carried out jointly with an SLC. LSMS (Living Standards Measurement Studies) are essentially SLCs based on World Bank methodology. The other abbreviations used here are HES (Household Expenditure Survey); HIES (Household Income and Expenditure Survey); HBES (Household Budget and Expenditure Survey); and LFS (Labour Force Survey).
[a] Urban areas only.
.. Not available.

Caribbean poverty statistics are produced using a broadly common approach to calculating poverty lines and utilizing household consumption to calculate poverty rates (also referred to as poverty headcount ratios). Nevertheless, there are significant methodological and conceptual differences in the way that this common approach is applied in each country, which makes it difficult to compare the resulting estimates both across countries and over time. These include differences in the way that household consumption is measured, differences in the way that poverty lines are calculated and updated, and differences in the way that the consumption measure (or aggregate) is standardized for households of different sizes and composition. A consequence of this is that, despite the interest in the subject, there is no coherent Caribbean-wide analysis of poverty and its evolution over time.

This study focuses on the measurement of poverty in the English-speaking Caribbean[1] and Suriname where household consumption is used to measure poverty. For the rest of the Dutch-speaking Caribbean (Aruba, Curaçao and Sint Maarten), poverty statistics are unavailable. The overseas departments and regions of France (French Guiana, Guadeloupe and Martinique) as well as Puerto Rico and the United States Virgin Islands all produce estimates of poverty but use household income, in line with the National Institute of Statistics and Economic Studies (INSEE), the French national statistical office, and the U.S. Census Bureau, respectively.

There are arguments for and against the use of both consumption and income to calculate poverty (see for example Haughton and Khandker, 2009). The use of consumption is more common among countries where there is extensive informal employment, which makes income measurement more difficult. The use of income is more common among rich countries, as well as in Latin America where most countries also use income to measure poverty. The use of income in the overseas regions and departments of France and the territories of the United States is related to the integration of their statistical systems with those of France and the United States, respectively. Within these statistical systems, there is a very different approach to poverty measurement, the use of income being just one difference. The decision was taken, therefore, to exclude French Guiana, Guadeloupe, Martinique, Puerto Rico and the United States Virgin Islands from the scope of this study in order to focus on the English-speaking Caribbean and Suriname, where a history of collaboration around a common general approach to measuring poverty makes working towards greater harmonization a more realistic goal.

This study undertakes a comparative analysis of methods used to estimate monetary poverty in the Caribbean and considers the need for harmonized estimates to enable Caribbean-wide analysis and monitoring of poverty. It also tries to situate the Caribbean approach to poverty measurement within a wider context and therefore, reference is made to the recommendations of international organizations and common practice globally. Particularly relevant in this regard is the ECLAC income poverty measurement methodology (Economic Commission for Latin America and the Caribbean [ECLAC], 2019), which is used to produce harmonized estimates of monetary poverty based on household income data from national household survey microdata for Latin American countries. While this methodology cannot be applied in its entirety to the Caribbean, where poverty measurement is based on expenditure, substantial parts of the methodology relating to the construction of poverty lines are directly relevant. Also pertinent is the fact that the ECLAC methodology was specifically developed to produce harmonized estimates, therefore it is an important reference for this review of poverty measurement in the Caribbean.

It is also important to mention the role of the World Bank in global poverty measurement. The World Bank works to harmonize national household survey-based estimates of income and expenditure (referred to as welfare aggregates) and uses international poverty lines to produce consistent measures of poverty across countries. Up until now, most Caribbean countries have not been included in this global monitoring using international poverty lines. However, a recently published paper documented the steps that the World Bank

[1] This comprises Anguilla, Antigua and Barbuda, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands and United States Virgin Islands.

followed to construct harmonized consumption-based welfare aggregates for four Caribbean countries (Grenada, Jamaica, Saint Lucia, and Suriname) for inclusion in global monitoring of poverty (including SDG1) (Saavedra et al., 2025). The same approach was subsequently applied to survey data from Barbados and Belize, enabling the presentation of harmonized estimates for six countries (World Bank, 2025b). It is hoped that this initiative can be extended to more Caribbean countries.

The first chapter of this study analyses the comparability of the consumption aggregates compiled from recent Caribbean surveys of living conditions and household budget surveys. The second chapter analyses the comparability of the methods used to calculate poverty lines. The third chapter discusses how harmonized estimates might be produced and presents some preliminary analysis, based on the application of a consistent methodology to national (i.e. non-harmonized) welfare aggregates. This is intended to explore the challenges involved in producing comparable estimates of poverty across countries of different income levels.

I. Measuring household consumption expenditure in Caribbean surveys

The measurement of household consumption expenditure provides a critical foundation for welfare and poverty analysis in the Caribbean. Consumption-based indicators are widely used to assess living standards, as they offer a more reliable and comprehensive measure of welfare in economies where income is volatile, seasonally dependent, or derived partly from informal activity. In such contexts, household expenditure patterns more accurately reflect actual living conditions than reported income (Haughton and Khandker, 2009). Consequently, household surveys that collect detailed expenditure data remain the main instrument for constructing poverty and inequality measures across the subregion. Yet differences in survey design, frequency, coverage, and valuation practices continue to complicate efforts to compare results across countries or over time.

Over the past two decades, the Caribbean has drawn on international and regional support to strengthen the use of consumption-based measures for poverty assessment. Surveys of Living Conditions, Household Budget Surveys, and combined SLC-HBS instruments developed with assistance from the Caribbean Development Bank and the World Bank established a foundation for measuring welfare through household expenditure data. Despite these advances, national adaptations in survey design have resulted in variation in expenditure coverage, recall periods, and valuation of non-monetary consumption (St. Catherine, 2004; World Bank, 2008). Recent analyses confirm that such methodological diversity persists across the subregion (Saavedra et al., 2025).

This chapter examines how these methodological differences influence the measurement of total household consumption expenditure, and by extension, the comparability of poverty estimates in the Caribbean. The analysis reviews survey instruments implemented between 2005 and 2021 across ten countries and evaluates three key dimensions that underpin the construction of harmonized consumption aggregates: coverage, reference period, and valuation. The chapter draws on the harmonized framework developed in a recent World Bank study (Saavedra et al., 2025) and applies a similar approach to a wider set of national surveys to identify common practices, areas of divergence, and their implications for regional comparability.

The results provide a basis for improving the design of future household surveys and for advancing the harmonization of poverty measurement methodologies across the Caribbean.

A. Methodological approach

1. Data sources and scope of analysis

To examine how household consumption expenditure is measured across Caribbean countries, this chapter reviews national household survey questionnaires designed to capture living conditions and expenditure. Saavedra et al. (2025) developed a harmonized approach for constructing comparable consumption aggregates across four Caribbean countries: Grenada, Jamaica, Saint Lucia and Suriname. This was subsequently extended to include Barbados and Belize (World Bank, 2025b). This chapter applies the same methodological framework to analyze questionnaires from ten countries, providing a broader regional perspective on the extent to which existing household survey instruments can support the construction of harmonized consumption-based welfare indicators. The assessment is exploratory and focuses on identifying aspects of survey methodology that may affect comparability, particularly in relation to expenditure coverage, recall and diary design, and valuation practices.

The surveys reviewed include the main instruments used for poverty and living conditions analyses in the subregion. These comprise the SLC, the HBS, combined SLC-HBS or SLC-HIES (Household Income and Expenditure) surveys, and the Household Expenditure Survey (HES). The SLC was designed primarily for poverty assessment and welfare monitoring, serving as the quantitative foundation for CPAs. The HBS, by contrast, collects detailed expenditure data consistent with the Classification of Individual Consumption According to Purpose (COICOP) and supports the compilation of consumer price indices and national accounts in addition to welfare analysis. The HES and HIES similarly collect household consumption expenditure for poverty and welfare analysis and, in the case of HIES instruments, varying degrees of income coverage. For this assessment, surveys from the following countries were analyzed: Antigua and Barbuda, Saint Kitts and Nevis, and Saint Lucia (SLC-HBS); Dominica (SLC-HIES); Barbados, Cayman Islands, Jamaica, Suriname and Trinidad and Tobago (SLC surveys); and Belize (HES). The differences in survey type reflect varying statistical objectives and institutional practices across the subregion.

Variation is also observed in questionnaire structure, recall design and use of expenditure diaries. Across countries, household- and individual-level questions were collected through either separate questionnaires or a single integrated questionnaire. Seven of the ten countries make use of short-period diaries, typically for seven or fourteen days, to capture frequent purchases such as food and transport. The remaining surveys rely exclusively on recall questions, with reference periods ranging from one to twelve months depending on the type of expenditure. These structural differences influence the level of detail captured in each instrument and have implications for the precision of estimates and their alignment with the harmonized framework.

Differences in data collection methods also affect the extent to which expenditure aggregates can be harmonized across countries. Instruments that use diaries for short-term or high-frequency items may better capture daily consumption, whereas recall-only surveys tend to rely on longer reference periods that can accommodate infrequent or seasonal expenditures. Such methodological variation has direct implications for constructing harmonized consumption aggregates and for assessing welfare and poverty comparability within the Caribbean. Understanding how these instruments differ in coverage, recall and valuation is therefore a necessary step toward identifying the adjustments required to achieve greater coherence in poverty measurement.

A summary of the questionnaires reviewed, including survey type, and diary use, is presented in table 2. More detailed information on sample size, fieldwork periods and recall design is provided in annex table A1.1.

Table 2
Main characteristics of the questionnaires reviewed

Country	Survey type	Reference year(s)	Questionnaire structure	Diary used
Antigua and Barbuda	SLC-HBS	2005–2006	Separate questionnaires	Yes (2 one-week)
Barbados	SLC	2016	Integrated questionnaire	No
Belize	HES	2008–2009	Integrated questionnaire	Yes (2 one-week)
Cayman Islands	SLC	2006–2007	Integrated questionnaire	Yes (1 two-week)
Dominica	SLC-HIES	2008–2009	Integrated questionnaire	Yes (2 one-week)
Jamaica	SLC	2021	Integrated questionnaire	No
Saint Kitts and Nevis	SLC-HIES	2007–2008	Separate questionnaires	Yes (1 two-week)
Saint Lucia	SLC-HBS	2015–2016	Integrated questionnaire	Yes (1 one-week)
Suriname	SLC	2016–2017	Integrated questionnaire	No
Trinidad and Tobago	SLC	2014	Separate questionnaires	Yes (1 two-week)

Source: Authors' compilation based on official survey documentation from national statistical offices and partner institutions.
Note: Detailed information on sample size, diary duration, and recall design is presented in the Annex. "Separate questionnaires" indicates that household- and individual-level questions were administered through distinct questionnaires within the same survey operation. "Integrated questionnaire" indicates that household- and individual-level questions were combined within a single questionnaire . Short recall periods (7–14 days or diaries) were typically used for food, beverages, transport, and other frequent expenditures. Medium recall periods (1–3 months) were applied to utilities, communication, and clothing, while long recall periods (6–12 months) covered durables, health, education, rent, and repairs. See annex table A1.1 for details on reference periods. Survey names are abbreviated as follows: SLC (Survey of Living Conditions); HBS (Household Budget Survey); SLC-HBS (Combined Survey of Living Conditions and Household Budget Survey); SLC-HIES (Combined Survey of Living Conditions and Household Income and Expenditure Survey); HES (Household Expenditure Survey).

2. A harmonized framework for comparing consumption expenditure

This analysis draws on World Bank guidelines on the construction of consumption aggregates (Deaton and Zaidi, 2002; and Mancini and Vecchi, 2022) and the more recent analysis of data from four Caribbean countries (Saavedra et al., 2025) which outlined a structured approach for organizing household expenditure data to improve the comparability of poverty and welfare indicators in the Caribbean. The present analysis extends that approach to a wider set of ten countries, with the aim of identifying methodological challenges related to the coverage and classification of consumption information needed to construct harmonized welfare aggregates.

The harmonized framework builds on COICOP 2018 of the United Nations Statistics Division, which provides the international standard for classifying household expenditure by function. COICOP offers a hierarchical structure that ensures consistency in how goods and services are grouped according to their purpose of use and serves as the basis for integrating household consumption data across statistical domains. Within this study, COICOP functions as the reference classification, ensuring conceptual alignment with international standards while accommodating the design of national survey instruments.

Following the World Bank methodology, the framework consolidates the thirteen COICOP household divisions into four analytical components:

- Food, which covers food and non-alcoholic beverages consumed at home and away, including home-produced and in-kind items;
- Non-food (non-durables), which includes all recurrent goods and services such as utilities, transport operations, education, health, and personal care;
- Durables, which comprise long-lasting goods such as household appliances, vehicles, and durable information and communication equipment; and

- Housing, which includes both actual and imputed rent representing the value of housing services consumed by the household.

This structure allows for consistent mapping of expenditure items across countries and supports the construction of harmonized consumption aggregates used in welfare and poverty analysis. The approach applied here is exploratory, focusing on how well existing survey instruments capture the expenditure domains required to estimate these aggregates. It serves as an initial step toward expanding harmonization efforts across a broader set of Caribbean countries and identifying areas for methodological improvement in future research. The harmonized classification used for this analysis is presented in table 3, and a detailed correspondence to COICOP 2018 divisions and classes is provided in annex table A1.2.

Table 3
Expenditure categories used in the comparative framework

Harmonization Component	Category	Subcategory
Food	Food and Beverage	Food (purchased); Food (homegrown); Food (in-kind); Meals away from home; School meals
Non-food (non-durables)	Alcohol and Tobacco	Alcohol; Tobacco
	Housing, water, electricity, gas and other fuels	Utilities; Repairs (minor)
	Household operations	Domestic staff; Childcare; Elderly care; Household supplies; Household services
	Health	Outpatient services; Hospitalization; Medicines / medical supplies; Health insurance (service component)
	Education	Tuition; Books; Uniforms; Transportation (school); Lessons; Boarding and lodging
	Transportation (operational costs)	Public transport; Fuel; Maintenance / repairs; Vehicle insurance
	Information and communication (services)	Telephone (mobile and landline); Internet and data; Digital subscriptions / software; Postage
	Recreation, sport and culture (non-durable)	Goods; Services; Subscriptions / printed media; Leisure travel
	Personal care, social protection and other services	Personal care; Social participation / ceremonies
	Financial and insurance services	Insurance services; Financial services fees
Durables	Furnishings, household equipment and routine maintenance	Major appliances and furnishings; Minor appliances and furnishings; Small tools and household textiles
	Transportation (purchases)	Vehicle purchase
	Information and communication (goods)	Durable ICT goods (computers, televisions, etc.)
	Recreation, sport and culture (goods)	Recreation durables / musical instruments
Housing	Housing services	Rent; Imputed rent

Source: Authors' compilation based on Saavedra et al. (2025), *Constructing Harmonized Consumption-based Welfare Aggregates for Poverty and Inequality Analysis in Caribbean Countries* and United Nations (2018), Classification of Individual Consumption According to Purpose (COICOP) 2018.
Note: A detailed correspondence to COICOP 2018 divisions is provided in annex table A1.2.

3. Assessing the framework

Each expenditure subcategory in the framework was evaluated along three methodological dimensions: coverage, reference period, and valuation. Together, these dimensions capture the main design features that determine how household consumption expenditure is recorded and valued within national survey instruments, and how comparable those measures are across countries.

(a) Coverage

Coverage assesses whether each expenditure item is explicitly collected in the questionnaire or is among the types of expenditure expected to be recorded in the diary. For every subcategory, the relevant question or potential diary coverage was reviewed to determine inclusion. A standardized coding scheme was used to classify each observation as:

- Yes: item explicitly collected;
- No: item not collected; or
- Not Stated Explicitly (NSE): unclear whether the item was collected.

Where a diary form was unavailable, coverage information was drawn from supporting documentation such as technical reports. The classification results were later consolidated to identify variation in the comprehensiveness of expenditure coverage across instruments.

The assessment was organized using the harmonized analytical framework described previously, which groups household expenditure into four components: Food, Non-food (non-durables), Durables, and Housing. Each subcategory within these components was reviewed across the ten countries to determine whether it was explicitly included in the available survey instruments.

Evaluating coverage in this way helps to determine how well existing survey instruments capture the components of total household consumption required to construct harmonized welfare aggregates. The results therefore provide a diagnostic view of harmonization readiness across the subregion, identifying areas where national questionnaires align with international standards and where further refinement may be needed to support full harmonization of poverty and welfare statistics.

(b) Reference period

The assessment of reference periods examined how national survey instruments define the time frame over which households report their expenditure, focusing on whether these periods reflect the expected frequency of purchase or use. The review covered both recall and diary instruments, identifying the duration applied to each expenditure subcategory and comparing these across countries.

For food expenditure, the evaluation was guided by international recommendations emphasizing that the recall period for food should correspond to its frequency of purchase or consumption (Mancini and Vecchi, 2022). A short recall period of seven to fourteen days is recommended to reduce recall error and underreporting of small, frequent transactions. Using this benchmark, the analysis assessed whether each country's instrument applied an appropriate short reference period for food items collected through recall questions or short expenditure diaries. Reference periods were classified as consistent (7-14 days), too long (beyond 14 days), or not included (where the category was omitted or unclear).

For non-food expenditure, there is no standardized international recommendation. Mancini and Vecchi (2022) and Saavedra et al. (2025) note that the choice of reference period is typically left to national statistical offices, allowing flexibility to reflect country-specific purchase patterns and data-collection practices. To facilitate comparison, the present analysis established typical reference periods based on the frequency-of-purchase principle outlined in Mancini and Vecchi (2022). These durations ranged from seven days for very frequent items such as alcohol and tobacco to twelve months for infrequent or seasonal expenditures, including durables, insurance, and education. The resulting classification provided a consistent benchmark for assessing whether reference periods used across Caribbean surveys align with the expected frequency of purchase and can support the construction of harmonized consumption aggregates.

(c) Valuation of consumption

The assessment of valuation practices examined how household surveys assign monetary value to the goods and services consumed by households, with a focus on whether non-purchased consumption is captured and how it is valued. The analysis covered both questionnaire and diary instruments and concentrated on four domains that are most relevant for comparability: housing (imputed rent), food produced for own consumption, food received in kind or as gifts, and durable goods. These domains were selected because they represent areas where differences in valuation can significantly influence the measurement of total household consumption and welfare.

For each country, the review identified the method used to determine value, whether through direct reporting by the household, imputation using market or replacement prices, or omission of value altogether. To ensure consistency across instruments, a standardized classification was applied as follows:

- Explicit value (self-reported): respondent provides the actual or estimated value of the item consumed.
- Imputed value (market-based): value estimated or instructed to be reported using local market or replacement prices.
- Not included: item collected only in physical quantities or not covered in the survey instrument.

For housing, the assessment examined whether owner-occupied or rent-free dwellings were assigned an imputed rental value to capture housing services consumed. For food, the review determined whether home-produced and in-kind items were valued at market or replacement cost, consistent with the treatment of non-purchased consumption in the construction of welfare aggregates. For durables, the focus was on whether expenditures were recorded at the full purchase price or converted into an annual use value.

The findings from this assessment were organized into comparative tables summarizing how each domain was valued across countries, distinguishing between explicit, imputed, and omitted values. These tables provided a systematic basis for identifying consistent practices and methodological differences, and for assessing their implications for the comparability of household consumption and welfare estimates across national surveys.

B. Comparative assessment of survey practices

1. Coverage of consumption expenditure items

Table 4 summarizes the coverage of consumption expenditure variables across ten Caribbean household surveys, organized according to the harmonized framework. The table indicates whether each expenditure item identified in the framework was explicitly collected in the national questionnaires or would likely be captured through the expenditure diary. The shading is equivalent to "Yes" which represents explicit or potential inclusion, while unshaded areas are equivalent to "No" or "Not Stated Explicitly" which indicates that the item was omitted, or its collection was unclear.

The results provide an overview of how comprehensively national survey instruments capture the components of household consumption expenditure required to construct harmonized welfare aggregates. They identify the categories of consumption where existing data are sufficient and those areas where omissions could limit comparability.

Coverage was reviewed under the four harmonization components of the framework: Food, Non-food (non-durables), Durables, and Housing. Overall, the results show broad and consistent coverage across the principal categories of household consumption, consistent with findings of the Saavedra et al. (2025) study, particularly for food, utilities, transport, and education. These domains are central to the construction of welfare aggregates and are captured in all survey instruments.

Table 4
Coverage of expenditure variables across Caribbean household surveys

Harmonization component	Category	Variable	ATG 2006	BRB 2016	BLZ 2008/9	CYM 2006/7	DMA 2008/9	JAM 2021	KNA 2007/8	LCA 2005/6	SUR 2016/17	TTO 2014
Food	Food and Beverage	Food (purchased)	■	■	■	■	■	■	■	■	■	■
		Food (homegrown)	■	■	■	■	■	■	■	■	■	■
		Food (In-kind)		■		■	■	■	■	■	■	■
		Meals away from home	■	■	■	■	■	■	■	■	■	■
		School meals	■	■	■	■	■	■	■	■	■	■
Non-food (non-durables)	Alcohol and tobacco	Alcohol	■	■	■	■		■	■	■	■	■
		Tobacco	■	■	■	■		■	■	■	■	■
	Clothing and footwear	Clothing	■	■	■	■	■	■	■	■	■	■
		Footwear	■	■	■	■	■	■	■	■	■	■
		Minor repairs/maintenance	■	■	■	■	■	■	■	■	■	
	Housing, water, electricity, gas and other fuels	Utilities	■	■	■	■	■	■	■	■	■	■
		Repairs (minor)	■	■	■	■	■	■	■	■	■	■
	Household operations	Domestic staff	■	■	■	■	■	■	■	■	■	■
		Childcare	■		■	■	■		■	■		
		Elderly care	■		■	■	■		■	■		
		Household supplies		■	■	■	■	■	■	■	■	■
	Health	Outpatient Services	■	■	■	■	■	■	■	■	■	■
		Hospitalization	■	■	■	■	■	■	■	■	■	■
		Medicines/ Medical supplies	■	■	■	■	■	■	■	■	■	■
		Health insurance (service component)	■	■	■	■	■	■	■	■		■
	Education	Tuition	■	■	■	■	■	■	■	■	■	■
		Books	■	■	■	■	■	■	■	■	■	■
		Uniforms	■	■	■	■	■	■	■	■	■	■
		Transportation	■	■	■	■	■	■	■	■	■	■
		Lessons	■	■	■	■	■	■	■	■	■	■
		Boarding and lodging	■	■	■	■	■	■	■	■	■	

Harmonization component	Category	Variable	ATG 2006	BRB 2016	BLZ 2008/9	CYM 2006/7	DMA 2008/9	JAM 2021	KNA 2007/8	LCA 2005/6	SUR 2016/17	TTO 2014
	Transportation	Public										
		Fuel										
		Maintenance/ repairs										
		Vehicle insurance										
	Information and communication	Telephone (mobile and landline)										
		Internet and data										
		Digital subscriptions/software										
		Postage										
	Recreation, sport, and culture	Goods										
		Services										
		Subscriptions/ printed media										
		Leisure travel										
	Personal care, social protection & miscellaneous services	Personal care										
		Social participation/ceremonies										
	Financial and Insurance Services	Insurance services										
		Financial Services fees										
Durables	Furnishings and equipment	Major appliances and furnishings										
		Minor appliances and furnishings										
		Small tools and household textiles										
		Minor repairs/ maintenance										
	Transportation (operational costs only)	Vehicle purchase										
Housing	Housing services	Rent										
		Imputed rent										

Included Not explicitly included

Source: Authors' compilation based on official survey documentation from national statistical offices and partner institutions.

Within the food component, all countries collect data on food purchases and meals consumed away from home. Minor variation exists in how home-produced or in-kind food is described, but the concept is generally covered. Differences mainly relate to wording, the level of examples provided, and whether respondents are asked to report quantities or estimated values for these items.

Under non-food (non-durables), coverage is extensive yet less uniform. Items such as clothing, utilities, transport operations, education, and health are consistently collected, while others, mainly service-based categories like childcare, elderly care, and postage, show lower coverage. Some instruments do not include these categories, while others capture them indirectly through broad expenditure headings. Personal care and recreation are commonly included but differ in the level of detail. These differences do not significantly affect the total consumption aggregate but can reduce comparability at lower levels of classification.

The durables component, covering furnishings, household equipment, and vehicle purchases, is well represented across all ten countries. Most instruments collect both purchases and repairs of durable goods, ensuring that high-value and infrequent expenditures are included. Minor differences in how countries classify household tools or small equipment were observed but do not significantly affect harmonization. In the construction of harmonized welfare aggregates, the focus for durables is on the annualized use value of these goods, rather than their full purchase cost, and most surveys provide sufficient information to support this estimation.

For housing, coverage is almost universal. All instruments collect information on rent, and most also include owner-occupied dwellings through imputed rent. A "Yes" was assigned only where questionnaires asked owner-occupiers to estimate how much their dwelling would rent for if leased on the market, allowing for a direct valuation of housing services consumed. The wording and valuation approach for imputed rent vary across surveys, but coverage is complete in all countries except Barbados and Suriname, where no direct question on rental value is included. However, both questionnaires collect detailed information on dwelling structure and facilities that could support an indirect estimation of imputed rent using model-based methods.

Country-specific omissions are limited but provide useful insight into where gaps in coverage may affect harmonization. The most common omissions relate to service-based and non-monetary items such as childcare, elderly care, and postage. Gaps by country are summarized below:

- Trinidad and Tobago: home-produced food, childcare, elderly care, and postage.
- Suriname: imputed rent and care-related services.
- Barbados: imputed rent, postage and elderly care.
- Dominica: postage, childcare, and elderly care.
- Antigua and Barbuda: postage and elderly care.
- Jamaica: home-produced food, childcare, and elderly care.
- Saint Lucia: postage, childcare, and elderly care.
- Belize: postage and elderly care.
- Saint Kitts and Nevis and the Cayman Islands: comprehensive coverage.

These omissions primarily affect comparability for service-related and in-kind consumption categories rather than the core expenditure domains such as food, housing, education, and transport.

Overall, the results indicate that Caribbean household surveys provide comprehensive coverage of the main components of household consumption expenditure. Remaining gaps relate mainly to service-oriented and non-monetary items that are less frequently captured or not always clearly defined. Addressing these differences in future survey rounds would improve harmonization and ensure more consistent measurement of household welfare across the subregion.

2. Reference periods

(a) Food component of total household consumption

As described in subsection A.3 (b) above, international guidance emphasizes that the recall period for food should align with the frequency of purchase or consumption. A short recall of seven to fourteen days is generally recommended, as longer periods increase measurement error and reduce comparability across surveys (Mancini and Vecchi, 2022). When recall periods exceed two weeks, recall decay becomes a concern, since respondents are more likely to forget small, frequent purchases, leading to underestimation of total food consumption (Saavedra et al., 2025).

In the Caribbean, household surveys use either recall interviews or short expenditure diaries to record food consumption. There are pros and cons to both methods which can each be affected by different kinds of measurement error (see for example Brzozowski et al., 2017). Five of the ten countries reviewed used both instruments (Antigua and Barbuda, Belize, Cayman Islands, Dominica, and Saint Lucia), typically maintaining a one- or two-week diary alongside the household questionnaire. The diaries were primarily used to capture food purchases, food received as gifts, and own-produced or other in-kind food transactions, providing a detailed record of short-term household consumption. Countries that relied only on the household questionnaire, such as Barbados, Jamaica, Suriname, and Trinidad and Tobago, collected similar information through recall questions covering the same food categories.

Table 5 compares the recall and diary reference periods for food subcategories against the recommended 7- to 14-day benchmark. Overall, the pattern shows strong alignment for purchased food and meals away from home, while longer reference periods are common for home-produced food and school meals. In most cases, these extended recall periods correspond to one-month reporting frames in the questionnaire component rather than in the diary.

Table 5
Consistency of reference periods for food consumption across Caribbean household surveys

Food subcategory	Consistent	Too long	Not included	Countries by reference period issue
Food purchased	10	0	0	
Food (home-produced)	6	4	0	Too long (Antigua & Barbuda, Belize, Dominica, Saint Lucia)
Food (in-kind)	5	3	2	Too long (Dominica, Jamaica, Saint Lucia); Not included (Antigua & Barbuda, Belize)
Meals away from home	9	1	0	Too long (Dominica);
School meals	2	7	1	Too long (Antigua & Barbuda, Barbados, Cayman Islands, Dominica, Jamaica, Suriname, Trinidad & Tobago); Not included (Belize)

Source: Authors' compilation based on national household survey instruments (latest available), associated technical reports and Mancini and Vecchi (2022), *On the Construction of a Consumption Aggregate for Inequality and Poverty Analysis.*
Note: The reference period recommended by Mancini and Vecchi (2022) for food collected through recall interviews and short-term expenditure diaries is seven to fourteen days. "Consistent" denotes recall within 7–14 days or 7- or 14-day diary; "too long" signifies a recall period longer than 14 days; while "not included" indicates the subcategory of expenditure is absent or not explicitly identified in the questionnaire or captured by the diary.

Across the ten surveys, all countries used a short reference period for purchased food, and nine did so for meals away from home, consistent with international guidance. In contrast, home-produced food exceeded the recommended two-week limit in four countries (Antigua and Barbuda, Belize, Dominica, and Saint Lucia), and school meals in seven (Antigua and Barbuda, Barbados, Cayman Islands, Dominica, Jamaica, Suriname, and Trinidad and Tobago). A few instruments omitted or did not indicate explicitly certain food components, particularly food in-kind (Antigua and Barbuda and Belize) and school meals (Belize).

These findings indicate that while Caribbean household surveys have largely implemented short reference periods for purchased food and meals away from home, greater harmonization is still needed for home-produced food and school meals. The use of longer recall periods for these items can lead to recall decay and under-reporting, thereby affecting the accuracy of the consumption aggregate and cross-country comparability. This is particularly relevant for home-produced food, which plays a more significant role in rural and lower-income households where agricultural employment is common (Saavedra et al., 2025).

(b) Non-food component of total household consumption

The non-food component of household consumption covers a diverse set of items that vary in how frequently they are purchased or paid for. Caribbean household surveys generally distinguish between regular payments, occasional purchases, and infrequent or seasonal expenditures. The degree of alignment with this structure, however, differs across expenditure domains.

The most consistent areas are utilities, communication, and personal care, where one-month reference periods dominate (table 6). Utilities such as electricity, water, and gas are collected monthly across all instruments, corresponding to household billing cycles. Similarly, telephone, internet, and other communication services are typically reported using a one-month frame, although some surveys apply shorter recall for prepaid services or longer periods for annual subscriptions. Personal care also shows a high level of standardization, with one-month reference periods reflecting the regularity of such purchases. These short and uniform durations contribute to strong harmonization across countries.

In contrast, greater variation appears among items with less predictable purchase patterns. Clothing and footwear are generally collected using a three-month recall, but some surveys apply annual reference periods. Household operations display a similar range, from one to twelve months, depending on whether services such as domestic help, cleaning, or household maintenance are treated as ongoing or occasional. Recreation, culture, and social participation show the widest divergence, with recall ranging from weekly to annual periods. This diversity partly reflects the irregular nature of these expenditures, but when long recall frames are applied to frequent small purchases, comparability weakens because the underlying frequency of consumption differs. Variation is therefore more problematic in categories where the reporting period influences the amount of spending recorded.

Durables and housing exhibit more uniform reference periods, though they rely on longer reporting frames. All countries use a twelve-month recall for durable goods such as furniture, appliances, and vehicles, which align with the infrequent nature of these purchases. Housing rent is consistently collected using a one-month reference period that reflects standard payment schedules. For owner-occupiers and households living rent-free, questionnaires usually include a question asking respondents to indicate the amount they would expect to pay if they were renting the dwelling. These self-assessed values provide an approximate rental equivalent for non-renters and ensure that information on housing consumption is captured across all tenure types. Maintenance and repairs show more variability, with recall periods ranging from three to twelve months, but the impact on comparability is limited since these are irregular expenses that can be annualized reliably.

Overall, the reference periods for the non-food component of total household consumption are largely consistent for regular expenditures such as utilities, communication, and rent, but less standardized for items with irregular or mixed-frequency spending. The short, fixed recall applied to routine expenses supports strong harmonization across countries, while the wider range of reporting periods observed for clothing, household operations, recreation, and maintenance may influence cross-country comparability by affecting how these expenditures are scaled and weighted in total household consumption.

Table 6
Typical reference periods and observed practices across expenditure domains in Caribbean household surveys

Expenditure domain	Typical reference period[a]	Observed range across countries[b]	Common deviations	Interpretation / harmonization implication
Food	7–14 days (recall or diary)	7 days – 1 month	Longer recall for home-produced food and school meals	Generally harmonized; extended periods risk recall decay and under-reporting (Saavedra, Sanchez and Olivieri, 2025).
Alcohol and tobacco	7–14 days	7–14 days	…	Harmonized; short recall suitable for frequent purchases with minimal comparability issues.
Clothing and footwear	3 months	3–12 months	Some annual frames used	Variation reflects irregular purchases; differences in recall period affect comparability of annualized totals.
Household operations	1–3 months	1–12 months	Longer frames for services such as domestic staff	Wide variation across services; inconsistent scaling of monthly and annual frames affects comparability.
Utilities (electricity, water, gas)	1 month	1 month	…	Harmonized; aligns with monthly billing cycles.
Information and communication	1 month	7 days – 12 months	Short recall for small mobile-top-ups; longer for subscriptions	Variation modest and manageable; monthly reference supports high comparability.
Personal care	1 month	1–12 months	Annual recall for infrequent services	Variation limited; recall length differences unlikely to significantly affect comparability.
Social participation / ceremonies	12 months	1–12 months	Some monthly recall used	Longer recall suitable for irregular events; minor impact on comparability.
Recreation and culture - goods	3-12 months	7 days – 12 months	Shorter recall for entertainment goods in some surveys	Broad range linked to mixed purchase frequency; high variation reduces cross-country comparability.
Recreation and culture - services	1-3 months	7 days – 12 months	Short recall for events; annual for travel	Large spread reduces comparability; shorter recall preferred for frequent activities.
Transport - operational costs (fuel, public transport, maintenance)	1-3 months	7 days – 12 months	Short recall for fuel and fares; longer for maintenance	Very wide variation; inconsistent scaling complicates annualization.
Transport - vehicle insurance	12 months	1–12 months	Short recall in some surveys	Recall differences reflect contract timing; annual reference preferred for harmonization.
Health (services and supplies, excl. insurance)	1-3 months	1–12 months	Longer recall for hospitalization and medical supplies	Broad range; variation affects comparability of health consumption.
Health insurance	12 months (contract cycle)	1–12 months	Monthly or quarterly frames used	Variation sizable; consistent annualization is essential since inclusion is now standard
Education - fees and materials	12 months	3–12 months	Quarterly recall for some costs	Annual period is most appropriate; shorter recall may omit one-off payments.
Education - transport	1–3 months	3–12 months	Longer recall common	Variation in recall period between monthly and annual frames complicates harmonization across countries.
Education - lessons and tutoring	1–3 months	1–12 months	Short recall for continuous lessons; annual for private courses	Wide range; affects consistency of education sub-aggregate.
Insurance and financial services (excl. vehicle and health insurance)	12 months	1 or 12 months	Some monthly frames for service fees	Generally harmonized; annual preferred for comparability.
Durables (furniture, appliances, vehicles, tools)	12 months	12 months	…	Harmonized; long recall aligns with infrequent purchases. Comparability depends more on valuation method than recall.
Housing - rent (actual)	1 month	1 month	…	Fully harmonized; matches payment frequency.

Expenditure domain	Typical reference period[a]	Observed range across countries[b]	Common deviations	Interpretation / harmonization implication
Housing - imputed rent	1 month (imputed or model-based)	n.a.	…	Not recall-based; estimated via imputation.
Housing - maintenance and repairs	12 months	3–12 months	Shorter frames in a few surveys	A long recall appropriate for irregular expenses; ensure consistent annualization. Variation minimal; manageable through consistent conversion.

Source: Authors' compilation based on national household survey instruments (latest available) and Deaton and Zaidi (2002), Mancini and Vecchi (2022), and Saavedra et al. (2025).
[a] "Typical reference period" refers to the time frame used to capture expenditure, whether through recall or diary instruments, consistent with the frequency of purchase principle recommend by Deaton and Zaidi (2002) and Mancini and Vecchi (2022).
[b] "Observed range" summarizes the reference periods appearing in the national instruments reviewed.

3. Valuation of consumption

The valuation of household consumption expenditure reflects how monetary and non-monetary items are assigned a value within survey instruments. Across the Caribbean, valuation practices generally follow the conceptual framework established in the World Bank's Living Standards Measurement Study (LSMS), which recommends that household consumption aggregates capture both market transactions and non-monetary consumption, including own-production, in-kind receipts, and the implicit use of owner-occupied housing (Deaton and Zaidi, 2002). However, national practices vary considerably in terms of coverage, precision, and consistency of valuation methods, particularly for housing and durable goods.

Most countries explicitly capture imputed rent for owner-occupied dwellings. Questionnaires in Antigua and Barbuda, Dominica, Saint Kitts and Nevis, Saint Lucia, Trinidad and Tobago, and others include direct questions asking households to estimate the rent their dwelling could command if leased on the market. These self-assessed values are subsequently incorporated into total consumption, providing a proxy for the flow of housing services consumed by owners. By contrast, some surveys, such as those for Barbados and Jamaica, collect information only on actual rent payments and omit rental equivalence for owner-occupiers, resulting in partial coverage of housing consumption and limiting comparability across countries.

For food consumption, valuation of non-purchased items is common, though implementation differs. Most questionnaires include sections on home production, instructing households to report both the quantity and estimated value of goods consumed from their own garden, farm, or livestock. Similarly, food received as gifts or in-kind transfers is generally valued at the respondent's estimated market price or the cost it would have taken to purchase the item. These self-reported or imputed market values ensure that total consumption reflects both monetary and non-monetary sources of food. Exceptions occur where instruments collect only quantities for home-produced or gifted food without assigning a monetary equivalent, leading to underestimation of total consumption.

Valuation of durable goods shows the greatest divergence from international guidance. In all reviewed instruments, purchases of durable items such as furniture, appliances, or electronic equipment are recorded at their total acquisition cost, without converting these amounts into an estimated yearly cost or value of use. While this approach simplifies reporting and aligns with standard SLC design, it overstates consumption in the year of purchase and reduces comparability with welfare aggregates that treat durable goods as a flow of services over time. The survey conducted in Suriname applies an adjustment using an annualization coefficient to standardize reporting periods, although this does not constitute full conversion of purchase values into annual use estimates (Inter-American Development Bank, 2018). These patterns are summarized in table 7, which presents common valuation practices across expenditure domains, highlighting country variations and their implications for comparability. A more detailed breakdown of valuation approaches by country is provided in annex table A1.3, which shows how each instrument treats imputed rent, home-produced and in-kind food, and durable goods.

Table 7
Summary of valuation practices in Caribbean household surveys

Domain	Common practice and country variations	Implications for comparability
Housing (imputed rent)	Most countries ask owner-occupiers to estimate the rent their dwelling could command if leased, providing an explicit imputed value. Barbados and Jamaica collect only actual rent, omitting rental equivalence.	Exclusion of imputed rent understates total housing consumption and reduces comparability of welfare aggregates.
Food (home-produced)	Quantities and estimated values of home-produced food are recorded in most instruments, but some (for example, Barbados) collect quantities only or focus on production for sale.	Missing valuation of home production leads to underestimation of food consumption, particularly in rural areas.
Food (in-kind/gifts)	Most surveys value in-kind food using respondents' estimated market price or replacement cost. In some cases, such as Barbados, only quantities are recorded.	Inconsistent treatment of in-kind consumption reduces comparability of total household consumption across countries.
Durables	Purchases of durable goods are recorded at total acquisition cost within the recall period, with no conversion to annual use value. Suriname adjusts reported expenditures to a twelve-month basis using an annualization coefficient.	Full-cost reporting may overstate consumption in the year of purchase; standardized adjustment (as in Suriname) improves comparability but does not account for depreciation.

Source: Authors' compilation based on national SLC/HBS/HIES questionnaires and methodological reports.
Note: The table summarizes valuation approaches across ten Caribbean household surveys conducted between 2005 and 2021. Imputed rent is the estimated market rental value for owner-occupied or rent-free dwellings. The *annualization coefficient* used in the Suriname SLC (2016–2017) converts expenditures reported for shorter or longer recall periods (e.g., weekly, quarterly) to a 12-month equivalent. It does not estimate depreciation or use-value.

Overall, valuation practices in the Caribbean demonstrate a strong reliance on respondent-based self-valuation, particularly for home-produced and in-kind consumption. This approach captures a broad spectrum of household welfare, especially in contexts where informal or non-purchased consumption is significant. Nonetheless, differences in whether and how imputed rent is collected, and the absence of consistent treatment for durable goods, limit cross-country comparability and may affect the measurement of living standards and poverty. Greater standardization in the treatment of non-monetary consumption, particularly for housing and durables, would strengthen the accuracy and comparability of poverty and welfare estimates across the subregion.

C. Towards harmonized measurement of household consumption

This assessment shows that Caribbean household surveys share a strong structural foundation for measuring consumption expenditure, but important methodological inconsistencies remain. Core domains such as food, housing, transport, and education are well covered, and reference periods for regular expenditures generally follow international practice. However, differences in how some items are defined, valued, or temporally referenced still limit full comparability across countries.

The use of long recall periods for certain frequent purchases, uneven valuation of non-monetary consumption, and omissions of certain service-related items illustrate that harmonization requires more than a shared classification framework. It requires convergence in questionnaire design, reference period alignment, and valuation methods. These variations, though technical, directly affect the accuracy of consumption aggregates and the comparability of poverty estimates across the region.

To advance harmonization, future survey rounds should adopt common benchmarks for recall and valuation, ensure consistent treatment of imputed rent and durable goods, and strengthen coordination among national statistical offices. Doing so would transform existing methodological diversity into a coherent subregional standard, improving both the quality and comparability of consumption-based welfare indicators in the Caribbean.

II. Comparability of methods used to calculate poverty lines and rates

Along with survey-based estimates of household consumption which serve as a proxy for standard of living, the estimation of poverty rates also requires the construction of a poverty line against which household consumption can be compared. This chapter will review the methods which are employed in the Caribbean to calculate poverty lines. Statistical offices in the Caribbean subregion, like those in many other economically developing countries as well as the United States, use what is referred to as the "cost of basic needs" approach to measuring poverty. The poverty line reflects the cost of these basic needs and households are deemed to be in poverty when their consumption (or income) falls below this level.

In practice, "basic needs" is generally taken to mean sufficient food to provide a nutritionally balanced diet with an additional allowance made for non-food items. The poverty line is therefore the sum of two components representing the costs of these basic food and non-food items. The food component is also used in its own right as the extreme poverty line (also referred to as the indigence line, or food poverty line), below which household consumption is insufficient even to meet basic food needs. As part of this process, both the poverty line and the welfare aggregate must be expressed in comparable units, in a way which takes account of different household sizes and compositions.

It is plausible that households can consist of some members whose basic needs are met and others whose needs remain unmet. Households share resources but do not necessarily do so evenly. However, it is very difficult, in practice, to measure poverty at an individual level. That would require direct measurement of the consumption of all the individuals in a household e.g. the amount of food consumed by each individual in a household. For this reason, household consumption is used to determine whether households are in poverty, based on whether their consumption is sufficient to meet the needs of all household members. Household consumption is thus a proxy for living standards for both households and persons, and household members simply inherit the poverty status of the household in which they are living.

A. The food component of the poverty line

The starting point for calculating the food component of the poverty line is the selection of a basket of food items that will meet recommended nutritional requirements. International recommendations for energy requirements through the life cycle were developed by the Food and Agriculture Organization, World Health Organization and United Nations University (FAO/WHO/UNU, 2004; FAO/WHO/UNU, 1985). These recommendations for energy intake vary by age, sex, bodyweight and level of physical activity. They have been widely used although there is still considerable variation in the way that assumptions about nutritional requirements are used to develop food baskets.

The construction of the food basket is often based on the consumption patterns observed in a reference population. The reference population is normally defined with respect to income or expenditure quantiles and is intended to consist of households that have sufficient resources to meet their basic needs (but not significantly in excess of this). These are the households whose food consumption should best approximate a basket of basic food items which meets recommended energy requirements in a cost-efficient way. Household survey data can be used to compile a list of food items and quantities that reflect the typical consumption patterns of these households and provide a nutritious and balanced diet.

These items are then priced, either using price data collected in the household survey, using information about quantities collected in the survey to derive prices indirectly, or using price data collected for the Consumer Price Index (CPI) (United Nations, 2005). The cost of this basket per 1,000 Kcal can then be used to convert the recommended energy requirements into a food poverty line.

The ECLAC poverty measurement methodology follows this same general approach and seeks to construct food baskets which satisfy the average energy requirements of national populations, using a structure of goods and prices given by consumption patterns observed in a reference group (ECLAC, 2019). The FAO/WHO recommendations for energy intake are combined with national population data on age and sex in urban and rural areas (and assumptions about levels of physical activity and bodyweight) to calculate the energy requirement per capita for the population. This calculation was carried out using software (FAO/WHO/UNU, 2004) for adjusting energy requirements to the demographic characteristics, physical activity and area of residence (rural or urban) of the population in each country.

The reference population should be indicative of households which are just about able to satisfy their basic needs for food and non-food items and would therefore be close to the poverty line. The ECLAC approach to identifying this reference population has been to analyse moving per capita income quintiles, one of which is then selected to serve as the reference population. The latest version of the method uses both information on material deprivations and household expenditure to identify the moving quintile which best represents households that are just able to satisfy their basic needs. The cost per 1,000 Kcal of this food basket can be priced in national currency which then enables the minimum requirements for energy and nutrition to be expressed in monetary terms, which becomes the food component of the poverty line. Since the energy requirement is a per capita value, the food component of the poverty line is also a per capita value.

A somewhat different approach has been used in most Caribbean countries, where food baskets for poverty measurement were developed with the support of the Caribbean Food and Nutrition Institute (CFNI), using a "nutrient cost analysis" and the institute's FOODPROG software. These food baskets were also based on recommended calorific intakes by age and sex although the nutrient cost analysis does not explicitly make use of the consumption patterns of a reference population.[2] Rather, it uses a list of local foods that are consumed in the country, and information about their respective prices and nutrient content, and then seeks

[2] The only Caribbean survey report which describes the selection and use of a reference population as part of the process of creating the food basket is that for Barbados 2016/17 (Sobrado, 2017). A reference population is also used by Sobrado (2018) for the construction of a food basket for Suriname, although this is not the official methodology used by the Government of Suriname.

to select the least expensive combination of items that meets the nutritional requirements and provides a balanced diet.

In this methodology, the calorific requirement is highest for adult males aged 19 to 29 at 2,400 Kcal. The energy requirements for other age and sex groups are expressed relative to this value (so for example, the requirement for males aged 10 to 14 is 0.825 of this value or 1,980 Kcal). In this way, the calorific requirement of households can be calculated based on their age and sex composition. Instead of calculating per capita energy requirements and poverty lines, most Caribbean countries use the energy requirement of 2,400 Kcal for adult males aged 19 to 29 to calculate an "adult equivalent" food poverty line i.e. the cost per day of a 2,400 Kcal food basket appropriate for a single adult male of this age. With the poverty line defined in this way, consumption must also be expressed in adult equivalent terms. To achieve this, the relative energy requirements by age and sex are used as an equivalence scale to standardize household expenditure in the form of adult equivalent expenditure.

A slightly different approach has been employed in Barbados, Belize and Montserrat, which is to use the equivalence scale to calculate food poverty lines (and poverty lines) which are specific to households of a given age and sex composition i.e. the equivalence scale is applied to the poverty lines rather than household consumption. In itself, this does not affect the calculation of the poverty headcount ratio although, as is discussed in more detail below, other methodological choices which are likely associated with the adoption of this alternative approach, can ultimately have some effect on the poverty headcount.

It is worth noting that the Caribbean Food and Nutrition Institute (CFNI) that developed this methodology and software ceased to exist at the end of 2012. It was one of five public health agencies whose functions were taken over by the Caribbean Public Health Agency (CARPHA) from 2013 onwards. The methodology however was widely used and has outlived the institution that developed it. More recently, some countries have begun working with the FAO on updating their minimum cost food baskets, but this remains a work in progress.

Most countries have used the threshold of 2,400 Kcal for adults or adult males although not always with the same relative calorific requirements for other age and sex groups. Three countries have adopted different thresholds for calorific intake. For example, Barbados's 2010 Country Assessment of Living Conditions utilised a minimum cost food basket supplied by the National Nutrition Centre (NNC) providing adult males aged 15-59 with 2,870 Kcal and some proportion of that amount for other age and sex groups (CDB, 2011). In Jamaica, meanwhile, the threshold for adult males (aged 18-29) was 2,970 Kcal compared to 2,200 for females of the same age (Planning Institute of Jamaica [PIOJ] and Statistical Institute of Jamaica [STATIN], 2010). Suriname's Multidisciplinary Working Group on Poverty Line Determination adopted a slightly reduced threshold of 2,200 per adult per day (for both males and females) (Sobhie and Kisoensingh, 2023). In Suriname, the approach also differed in other respects because the relative energy requirements by age and sex are not used as the equivalence scale (as discussed below, the "new Suriname equivalence scale" is used).

Some countries simply calculate a single national poverty line. However, in a situation where prices differ significantly across a country, there are good arguments for the construction of separate poverty lines for different areas, in order to better identify those living in poverty. This is relatively common practice, for example calculating separate urban and rural poverty lines or regional poverty lines. The ECLAC methodology is to distinguish between urban and rural areas.

Caribbean practice also varies in this regard. In Belize, poverty lines are calculated separately for each district. In Guyana, the approach was to calculate poverty lines by region with some regions also subdivided into urban and rural areas. In Jamaica, poverty lines are calculated for three areas: Kingston Metropolitan Area, other towns, and rural areas. In Suriname, the case for taking account of regional price differences is recognised but the necessary data on prices is not currently available (Sobhie and Kisoensingh, 2023). In the twin island State of Saint Kitts and Nevis, poverty lines are calculated by island. Other Caribbean countries calculate a single national line.

In larger Caribbean countries (Belize, Guyana, Jamaica, Suriname) which are marked by urban/rural disparities, it is likely to be appropriate to take account of differences in consumer prices across these countries. Multi-islands States may also need separate poverty lines for different islands. Where countries have chosen to apply their poverty measurement methodology at a subnational level, the national poverty headcount is calculated as the sum of subnational poverty headcounts. In smaller countries, at least those that are not made up of different islands, one would expect there to be less potential for geographic variation in price levels. In addition, household survey sample sizes in these countries are likely to be smaller and so, for these reasons, direct estimation of the poverty headcount at national level is likely to be more appropriate.

Where there are significant geographic differences in prices, subnational poverty lines are appropriate, but this will not be the case in all countries. Countries vary in size and regional disparities are more pronounced in some than others, therefore it may be appropriate to estimate poverty at different geographic levels in different countries. Rather than making estimates less comparable, as long as the rationale for making this methodological decision is consistent, applying the method at different levels in different countries could actually make the estimates more comparable.

There are also some differences in the way that countries update the food component of the poverty line when a new survey is carried out. When undertaking a poverty assessment some years after the previous one, it has been common practice to update the food basket using detailed price information. However, in more recent surveys in Grenada and Saint Lucia, consumer price indices were used to update the food poverty line. In Jamaica, which has carried out almost annual surveys since 1989, the CPI index has been used to update the poverty lines, with the same price adjustment applied to Kingston, other towns, and rural areas (World Bank, 2024). Updating the extreme poverty line with detailed CPI price data for the individual elements of the food basket provides a more accurate estimate than using a single CPI index. However, in practice, decisions about how to update the food component of the poverty line are not taken in isolation from the decision about how to update the poverty line as a whole, an issue which is discussed in more detail below.

Although there is much commonality in the methods used to define the extreme poverty line, there is not a uniformly consistent approach, with several countries applying notably different methodologies. For example, the differences in the thresholds for energy intake between countries (table 8) might be explained by different assumptions about levels of physical activity or bodyweights or other aspects of the methodology but likely have implications for cross-county comparability.

Table 8
Extreme poverty rates and daily calorie requirements used to calculate extreme poverty lines

		Extreme poverty rate (%)	Calorie requirement for food poverty line (Kcal)			Extreme poverty rate (%)	Calorie requirement for food poverty line (Kcal)
Anguilla	2002	2.0	2,400 for adult 18+[a]	Jamaica (continued)	2003	6.0	"
	2008/09	0.0	2,400 for male 19-29[b]		2004	5.7	"
					2005	4.3	"
Antigua and Barbuda	2005	3.7	2,400 for male 19–29[b]		2006	3.3	"
					2007	2.9	"
Bahamas (The)	2001	5.1	2,400 for an adult		2008	3.1	"
	2013	..	2,400 for an adult		2009	4.9	"
					2010	6.3	"
Barbados	1997	..	..		2012	7.5	"
	2010	9.1	2,870 for male 15–59[c]		2013	10.4	"
	2016/17	4.9	2,527 for male 18–30		2014	8.0	"
					2015	6.9	"
Belize	1996	13.4	2,400 for adult 20+[d]		2016	5.3	"
	2002	10.8	2,400 for male 19–29[b]		2017	5.4	"

		Extreme poverty rate (%)	Calorie requirement for food poverty line (Kcal)			Extreme poverty rate (%)	Calorie requirement for food poverty line (Kcal)
	2009	15.8	2,400 for male 19–29[b]		2018	3.5	”
	2018/19	9	..		2019	4.0	”
					2021	5.8	”
British Virgin Islands	2002	<0.5	2,400 for adult 18+[e]		2023	2.8	”
Cayman Islands	2007	..	2,400 for male 19–29[b]	Montserrat	2008/09	3.0	2,400 for male 19–29[b]
Dominica	2002	15.0	2,400 for adult 18+[a]	Saint Kitts	2000		..
	2008/09	3.1	2,400 for male 19–29[b]		2007	1.0	2,400 for male 19–29[b]
Grenada	1998	12.9	2,400 for adult 18+[e]	Nevis	2000		..
	2007/08	2.4	2,400 for male 19–29[b]		2007	1.0	2,400 for male 19–29[b]
	2018/19	3.5	”				
				Saint Lucia	1995	7.1	2,400 for adult[g]
Guyana	1993	29.0	2,400 for adult male		2006	1.6	2,400 for male 19–29[b]
	1999	19.0	2,400 for male		2016	1.3	”
	2006	18.6	2,400 for male				
				Saint Vincent and the Grenadines	1996	25.7	..
Jamaica	1989	..	2,970 for male 19–29[f]		2008	2.9	2,400 for male 19–29[b]
	1990	8.3	”				
	1991	..	”	Suriname	2000	..	..
	1992	14.5	”		2008	..	..
	1993	9.9	”		2013/14	24.9	2,200 for person 15+
	1994	8.0	”		2016/17	0.7	2,200 for person 15+
	1995	9.0	”		2022	1.1	2,200 for person 15+
	1996	8.6	”				
	1997	4.1	”	Trinidad and Tobago	1992	11.2	..
	1998	3.7	”		1997/98	8.3	..
	1999	5.1	”		2005	1.2	2,400 for male 19–29[b]
	2000	5.0	”				
	2001	4.9	”	Turks and Caicos Islands	1999	3.2	2,400 for an adult
	2002	7.3	”		2012	0.0	2,400 for male 19–29

Source: Authors' compilation.

[a] Weights of 1, 0.5, 0.3 and 0.2 for adults aged 18 and over, children aged 13-17 years, 8-12 years, and under 8 years respectively.

[b] Calorific requirements recommended by the CFNI (Caribbean Food and Nutrition Institute). The weights are as follows: 0.270, 0.468, 0.606, 0.697, 0.825, 0.915,1,0.966 and 0.773 for males aged less than 1, 1-3, 4-6, 7-9, 10-14, 15-18,19-29,30-60 and 61+ and weights of 0.270, 0.436, 0.547. 0.614, 0.695, 0.737, 0.741, 0.727 and 0.618 for females in the same age categories.

[c] Calorific requirements provided by the Barbados NNC (National Nutrition Centre). The weights are as follows: 0.48, 0.85, 1.00, 0.80 for males 0-5, 6-14, 15-59, and 60 and over and weights of 0.45, 0.72, 0.77, and 0.64 for females in the same age categories.

[d] Weights of 1, 0.5 and 0.3 for adults aged 20 and over, persons aged 12-19 years, and children under 12 years respectively.

[e] Weights of 1, 0.5, 0.3 and 0.2 for adults aged 18 and over, children aged 13-17 years, 7-12 years, and under 7 years respectively.

[f] Calorific requirements recommended by the Jamaica MoH (Ministry of Health) in consultation with the WHO/PAHO. The calorific requirement is 24% higher than that recommended by the CFNI (2,970 versus 2,400 Kcal). The weights for age and sex groups are very similar to those recommended by CFNI except that there is no distinction between the sexes of children.

[g] Weights of 1 for adults, 0.5 for adolescents and 0.3 for younger children (exact ages unknown).

” Denotes that the food poverty line for this survey year was calculated by 'uprating' the line for an earlier base year, using a CPI index. Lines calculated in this way can therefore also be regarded as being based on the same food basket that was used to calculate the food poverty line in the base year.

.. Not available.

Extreme (food) poverty, conceived in this way, is a measure of absolute poverty since the indigence line is defined as the cost of a fixed set of food items in certain quantities. The prices of those items may change over time, but as long as the quantities of food items making up the basket are held constant, then the extreme poverty line can be regarded as providing a consistent benchmark over time. Even if the items in the

basket are updated, for example due to evolving consumption pattens, as long as the calorific thresholds remain constant, then the extreme poverty line still represents fundamentally the same thing, which is the ability of a household to satisfy recommendations for energy intake in the form of a balanced diet consistent with national consumption patterns.[3] Therefore, to the extent that the underlying methods are comparable and consistent over time, the extreme poverty rates should provide a consistent benchmark over time.

However, this benchmark does represent an extreme level of poverty. A household whose total consumption is at the level of the extreme poverty line can, in theory, afford sufficient food, however, having purchased that food, they would then have no money remining to pay for gas to cook it, nor, if they needed them, plates, knives or forks to eat it with. As table 8 illustrates, national estimates of extreme poverty are now generally very low in most Caribbean countries.

Bearing in mind the fact that surveys do not reliably collect information about small population subgroups, and that welfare aggregates are at their most unreliable in their extreme tails, extreme poverty, certainly as measured through household surveys, is becoming less useful as an indicator in its own right (although it still serves a valuable role as the food component of the poverty line).

B. The non-food component of the poverty line

In addition to food, there are other basic needs which, in most national contexts, would be regarded as necessary to the achievement of an adequate standard of living. These might be expected to include housing, clothing, household goods, transport, and health care among others. Therefore, the poverty line also needs to incorporate an allowance for non-food needs.

In some countries, the cost of basic non-food needs is calculated directly by creating a "basket" of essential non-food items and valuing that basket. However, unlike the situation with food products, for which energy and nutrient requirements provide objective criteria for calculating the cost of basic food needs, there is no such clear-cut normative parameter for the consumption of non-food items (ECLAC, 2019).

While in some countries, a complete set of food and non-food goods is valued (Ravallion, 2010), many countries, including many in the Latin America and Caribbean region, use an indirect approach to determining the non-food component of the poverty line. This involves taking households whose food expenditure is at or close to the food poverty line (i.e. households who can only just meet their basic food needs) and finding the level of non-food expenditure that would be typical of such households (United Nations, 2005). This can be done using a regression model to estimate the ratio of food to total expenditure for a household whose food expenditure is precisely equal to the food poverty line. Alternatively, this ratio or 'food share' can simply be estimated from all households whose food consumption is within the vicinity of the food poverty line. Whichever of these two approaches is used to calculate the food share, the poverty line is obtained by multiplying the extreme poverty line by the inverse of this food share, which is called the Orshansky[4] coefficient. The non-food component of the poverty line is then simply the difference between the poverty line and the extreme poverty line.

Having set the poverty line in a base year, it needs to be updated over time as prices change. When annual updates are required, common practice is to use CPIs to update the extreme poverty line and the poverty line. Poverty lines are updated in order to ensure that they represent the same volume of food items (in the case of the extreme poverty line) or the same quantity of food and non-food items (in the case of the poverty line) i.e. that their purchasing power remains constant over time. When the line is updated in this way,

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[3] If the minimum calorific thresholds for each age and sex are combined into single minimum number of calories per capita, then this per capita value will vary slightly depending on the age structure of the population. In the same way, the recommended number of calories per capita can vary slightly over time as the population age structure changes.

[4] After Mollie Orshansky who, in the 1960s, developed the approach that still forms the basis for poverty measurement in the United States today.

it ensures that the line represents a constant volume of consumption and the resultant poverty estimates are thus comparable over time.

This process cannot be continued indefinitely, assuming that economies grow. Over time, the income and expenditure of households, including those in poverty, will increase in real terms. Measured against a poverty line held constant in real terms, poverty will tend to decrease. This may happen over 10, 20 or 30 years depending on the rate of growth in income per capita and how that growth is distributed but, sooner or later, poverty will reach a very low level.

Yet over time, as standards of living rise, ideas about what constitutes a minimum socially acceptable standard of living, and what it means to be poor, will change. As societies become wealthier, a higher level of consumption will be required to achieve that acceptable minimum. This means that, over time, poverty lines become out of date. Poverty measured against a line held constant in real terms for, say, 25 years, might be low, but this is because poverty is being measured by the standards of 25 years previously.

This means that, while in the short- and medium-term, poverty lines should be adjusted for inflation, every so often, to ensure that they remain relevant, poverty lines need to be reset or recalibrated so that their real value is brought up to date with longer term economic and social trends. When a poverty line is first established, it is established for a base year (or base period) and for as long as that poverty line is simply updated for inflation, it should be understood as the poverty line from that base year, because it reflects what was an appropriate poverty line at that time. When the poverty line becomes outdated, and there is a reset with a new line established in a new base year, this then becomes the basis for measuring poverty moving forward.

Returning to the calculation of poverty lines in a base year, ECLAC's methodology is to use the same reference population that was used to estimate the food basket to estimate the Orshansky coefficient, using the indirect method described above (estimating the food share from the reference population). While most Caribbean countries do not make explicit use of a reference population in the construction of the food basket, Caribbean countries do use reference populations to calculate the Orshansky coefficient and therefore the poverty line. Many use the bottom two quintiles as the reference population although a number of other alternatives have also been used.

Most Caribbean countries also use the indirect method to calculate the non-food component of the poverty line although some (mostly) earlier studies used an alternative method. Instead of multiplying the extreme poverty line by the reciprocal of the food share of the bottom two quintiles to obtain the poverty line, in some earlier studies the non-food expenditure per capita among the bottom two quintiles was simply added to the extreme poverty line (use of this methos is denoted "NFE Q1, Q2" in table 9). This is not a very satisfactory method. The reason why the indirect method uses the ratio between food and non-food expenditure of households whose food consumption is close to the food poverty line, is because if these households can only just meet their basic need for food, then, all other things being equal, they are probably only just meeting their non-food needs as well. Therefore, this ratio can be used to estimate the non-food component of the poverty line "indirectly" as a certain proportion or multiple of the food component. In contrast, simply using the average non-food consumption of the bottom two quintiles as the non-food component, without reference to the food component, does something quite different.

In more recent studies, the indirect method has been used to calculate the non-food component of the poverty line. It has been used with the bottom two quintiles as the reference population for calculating the food share of total expenditure (denoted "FS Q1, Q2" in table 9). This method has been applied at least once in twelve countries. Bahamas used deciles 2 to 4 as the reference population in 2001 ("FS D2-D4"), then decile 1 in 2013 ("FS D1"). Barbados used the first quintile in 2010 and, the 2010 report implies, in 1997 ("FS Q1") and then, in 2016/17, used the food share of households whose per capita consumption is within 10% of the extreme poverty line (FS EPL ±10%). The rationale for this approach is not clear. Suriname meanwhile used a fixed value of 1.67 in 2013/14, 2016/17 and 2022, based on an analysis of expenditure data for the first quintile from 2013/14.

It is important to take note of whether the Orshansky coefficient and the poverty line were set using a method of this kind in the most recent year, or in an earlier "base" year with the line then uprated in subsequent years using a CPI. In Latin America and many other regions, it is common to calculate the poverty line in a base year and then update it to the year for which the poverty estimate is needed using CPIs. A simple way of doing this is to update the extreme poverty line using the CPI for food products, with the non-food component of the poverty line updated by the CPI for all other products and services (United Nations, 2005). The ECLAC methodology utilises this approach although more sophisticated (and complicated) methods are sometimes used. Price indices can be constructed which are designed to more accurately reflect the consumption of a reference population of households close to the poverty line as opposed to the general population. Subnational price indices can be constructed. Monthly CPI data should be used so that the price indexes can be aligned with the household survey data and the months to which it corresponds. For example, Jamaica uses the weighted average of the monthly CPI based on the share of households in each survey month (World Bank, 2024).

Table 9
Calculation of the poverty line from the indigence line using the Orshansky coefficient

		Orshansky coefficient	Method of calculation			Orshansky coefficient	Method of calculation
Anguilla	2002	2.6	NFE Q1, Q2	Jamaica (continued)	2003	1.5	"
	2008/09	6.3	FS Q1, Q2		2004	1.5	"
					2005	1.5	"
Antigua and Barbuda	2005	2.6	NFE Q1, Q2		2006	1.5	"
					2007	1.5	"
Bahamas (The)	2001	3.0	FS D2-D4		2008	1.5	"
	2013	3.0	FS D1		2009	1.5	"
					2010	1.5	"
Barbados	1997	1.9	FS Q1		2012	1.5	"
	2010	2.0	FS Q1		2013	1.5	"
	2016/17	2.2	FS EPL ±10%		2014	..	"
					2015	1.5	"
Belize	1996	..	..		2016	..	"
	2002	1.9	FS Q1, Q2		2017	..	"
	2009	1.7	FS Q1, Q2		2018	..	"
	2018/19	3	..		2019	..	"
					2021	1.5	"
British Virgin Islands	2002	3.7	FS Q1, Q2		2023	..	"
Cayman Islands	2007	6.0	FS Q1, Q2	Montserrat	2008/09	3.0	FS Q1, Q2
Dominica	2002	1.7	NFE Q1, Q2	Saint Kitts	2000	1.6	NFE Q1, Q2
	2008/09	2.6	FS Q1, Q2		2007	2.8	NFE Q1, Q2
Grenada	1998	2.3	NFE Q1, Q2	Nevis	2000	1.6	NFE Q1, Q2
	2007/08	2.4	FS Q1, Q2		2007	3.3	NFE Q1, Q2
	2018/19	2.3	"				
				Saint Lucia	1995	1.9	..
Guyana	1993	1.4	FS Q1, Q2		2006	3.2	NFE Q1, Q2
	1999	1.4	FS Q1, Q2		2016	3.0	"
	2006	1.4	FS Q1, Q2				
				Saint Vincent and the Grenadines	1996	1.5	..
Jamaica	1989	..	FS Q1, Q2		2008	2.3	FS Q1, Q2
	1990	..	"				
	1991	..	"	Suriname	2000	..	..

		Orshansky coefficient	Method of calculation			Orshansky coefficient	Method of calculation
	1992	..	”		2008	..	..
	1993	1.5	”		2013/14	..	Fixed 1.67
	1994	1.6	”		2016/17	1.7	”
	1995	1.5	”		2022	1.7	”
	1996	..	”				
	1997	1.5	”	Trinidad and Tobago	1992	1.4	..
	1998	..	”		1997/98	1.6	..
	1999	1.5	”		2005	2.6	FS Q1, Q2
	2000	1.5	”				
	2001	1.5	”	Turks and Caicos Islands	1999	2.8	NFE Q1, Q2
	2002	1.5	”		2012	3.3	FS Q1, Q2

Source: Authors' compilation.
Note: Methods of calculating the Orshansky coefficient were as follows:
NFE Q1, Q2: The non-food component of the poverty line is calculated directly as the non-food expenditure per capita among the bottom two quintiles.
FS Q1, Q2: The reciprocal of the food share of the bottom two quintiles.
FS D2-D4: The reciprocal of the food share of deciles 2,3,4.
FS D1: The reciprocal of the food share of decile 1.
FS Q1: The reciprocal of the food share of the first consumption quintile.
FS EPL ±10%: The reciprocal of the food share of the households whose per capita consumption is within 10% of the extreme poverty line.
Fixed 1.67: A fixed Orshansky coefficient of 1.67.
” Denotes that the food poverty line for this survey year was calculated by 'uprating' the line for an earlier base year, using a CPI index. Lines calculated in this way can therefore also be regarded as being based on the same food basket that was used to calculate the food poverty line in the base year.
.. Not available.

For a long time, Jamaica was the only country in the Caribbean updating its poverty lines using the CPI (from 1989 to 2023) i.e. holding them constant in real terms. When other countries have carried out poverty assessments, they have tended to reset their poverty lines using an updated Orshansky coefficient based on more recent data, and so those poverty lines had a tendency to increase in real terms. More recently, Saint Lucia (in 2016), Grenada (in 2018), and Suriname (2022) all adopted the practice of updating poverty lines using CPIs. However, these countries do not necessarily use CPIs in exactly the same way to update their poverty lines. For example, Saint Lucia used the all items CPI to update the poverty line and the index for food and beverages to update the food poverty line, whereas in Suriname, the food and non-alcoholic beverages index was used to update the poverty line.

In addition to showing the methodology for calculating the non-food component of the poverty line in base years, table 9 also indicates the survey years where poverty lines were uprated from an earlier year using CPIs. These survey years are denoted with quotation marks (”). In Jamaica, for example, the reciprocal of the food share of the bottom two quintiles (FS Q1, Q2) was used to calculate what in Jamaica were three regional poverty lines in the base year (1989), and those lines were updated using the CPI in all subsequent years.

In all Caribbean countries except Jamaica, there may be ten or even more years between surveys. This is undoubtedly a factor which plays a role in decisions about whether to uprate poverty lines using CPI data or whether to recalculate them completely. A poverty line which was appropriate when it was first used, can seem rather out of date ten years later if the economic situation of low-income households has improved significantly over that period. It is not surprising that in poverty assessments carried out, say, ten years since the previous one, there is frequently a need to reset the poverty line in order to bring it up to date with current circumstances. This tendency to reset poverty lines every time a new survey was carried out, which for a long time was the established practice, was likely also related to the relatively more rapid growth in GDP per capita seen in the Caribbean up until 2008. Similarly, the more recent tendency to uprate poverty lines using CPI data, may also reflect the fact that due to much more muted growth in GDP per capita since 2008, there has been less need to recalibrate lines.

The country poverty assessment reports for Dominica 2008/09, Grenada 2008/09 and Anguilla 2007-09 (Kairi Consultants Limited, 2010a, 2009 and 2010b) described the situation thus:

> "The indigence rate is comparable over time as it is a measure of absolute poverty based solely on nutritional intake. However, the Headcount Index (or poverty rate) cannot strictly be compared across time...because poverty lines are relative (not absolute) and there is need to take into account constant purchasing power across time...however, countries often use the headcount index to compare how countries are performing relative to their neighbours and how they themselves are performing over time."

The cost of basic needs approach is concerned with the measurement of absolute poverty. This means that the line represents an actual quantity of food and non-food consumption, which over time must be adjusted for price changes, so that it continues to refer to the same quantity of consumption in current prices. The quotation above states that poverty lines that were calculated in these Caribbean poverty assessments were "relative," which refers to this previously common practice of recalibrating the poverty line whenever a new survey was carried out.

However, an absolute poverty line which is recalibrated every time a survey is carried out, does not become a relative poverty line. It is still an absolute poverty line, just one that has been recalibrated. A true relative poverty line defines people as living in poverty by virtue of their position in relation to some other group. This approach is more common in developed countries (Ravallion and Chen, 2017). A commonly quoted example is that used in the United Kingdom and for European Union statistics where 60% of median income is used as the poverty line. In this case, the relative concept of poverty is explicit and has a clear interpretation in the form of a gap between the middle and the lower part of the income distribution below which households are in poverty. Defined in this way, relative poverty can be interpreted for a single year and over time. Similarly, changes in poverty measured using poverty lines representing a fixed volume of consumption (i.e. absolute poverty) also have a clear interpretation over time. However, poverty rates calculated on the basis of an absolute poverty line which is recalibrated every time a survey is carried out, have no easy interpretation.

A significant part of the challenge of analysing Caribbean poverty statistics over recent years has been that in a significant number of countries, the poverty estimates were measured against a moving benchmark i.e. poverty lines were recalibrated with each new survey. This has meant that estimates of the poverty headcount have not been easily comparable with earlier estimates from the same country, even though, in most other respects, they were based on the same methodology. In this context, with countries making different decisions at different times about whether to hold poverty lines constant in real terms or whether to reset/recalibrate them, international comparisons have been even more difficult. The fact that in some more recent poverty assessments, poverty lines have been updated using CPI does not change the fact that all countries will, at some point, need to update their national poverty lines and that will be necessary at different times in different countries.

This is a problem inherent to poverty analysis based on infrequent surveys. If poverty is measured annually with a reset or recalibration of the poverty line after, say, 15 years, then statisticians can explain to data users the need for this periodic reset. However, with less frequent surveys, the need to reset the poverty line comes around almost as quickly as the surveys. Given a simultaneous need for poverty estimates based on a relevant national line, comparability over time, and cross-country comparability, it is unlikely that one single estimate of poverty can satisfy all these requirements.

As discussed above, poverty lines and welfare aggregates can be expressed either in per capita terms or equivalized with respect to household size and age structure. A per capita poverty line is defined for the average member of the population i.e. not an adult, not a child, not a man and not a woman, but the average member of a national population. If the poverty line is expressed in this way, the household consumption aggregate must also be expressed in the same terms i.e. household consumption per capita (total household consumption divided by household size). In measuring poverty this way, no account is taken of economies of

scale associated with household size and the cost of satisfying the basic needs of men, women, adults and children is assumed to be the same.

Equivalization involves using, in place of the average member of a population, a single reference household type (i.e. with a given size and age structure). Poverty lines are then calculated for this reference household type and the welfare aggregate must be standardized to that same household type using an equivalence scale. Equivalence scales express the relative cost of meeting the needs of each member of a household. Numerous scales have been proposed e.g. the OECD scale: 1 for the first adult, 0.7 for other adults, and 0.5 for each child. For example, if the reference household comprises two adults and two children, its OECD equivalized household size is 2.7. Household consumption is equivalized using the ratio of the equivalized size of the reference household to the household's own equivalized size.

It is common for the reference household to consist of a single adult, in which case equivalized expenditure is referred to as adult equivalent expenditure. However, the choice of the reference household is arbitrary and has no effect on the poverty headcount. Equivalence scales generally seek to adjust for two things: the differing requirements for resources of persons of different ages and economies of scale in larger households. They typically adopt some predetermined functional form with parameters intended to capture these age effects and economies of scale which are estimated based on consumption data for different households although this is far from straightforward and additional assumptions are required (United Nations, 2005). An alternative is to use calorific requirements by age and sex as an equivalence scale and as mentioned above, this is the most commonly used method in the Caribbean.

With respect to the use of equivalization versus per capita welfare aggregates, there is no clear consensus on which of these two approaches is best and practice varies across the world. Equivalization has an intuitive appeal since there are undoubtedly some economies of scale and age effects which influence the cost of satisfying the basic needs of households. However, there is no single accepted methodology for equivalization, the results obtained are sensitive to the choice of method, and it is not clear that they help to improve the method's ability to identify poor households or produce comparable results for cross-country analyses (ECLAC, 2019).

In Latin America, the majority of countries use the per capita approach while a few countries use equivalence scales and express poverty lines and the chosen welfare indicator in adult equivalent units. ECLAC and the World Bank also use per capita measures. In the Caribbean, it is the reverse with many countries preferring to use adult equivalent expenditure.

Another way that equivalence scales can be used is, instead of equivalizing the welfare aggregate, to compute separate indigence and poverty lines for each household according to their size and composition. This approach was applied in Barbados, Belize and Montserrat, while Suriname also calculates poverty lines which vary with household composition. At first sight, it appears that this method should result in the same poverty headcount. However, in the case of Belize and Montserrat, per capita household expenditure (rather than equivalized expenditure) was then used to rank households, to produce quintiles and deciles, and to determine the reference population used to calculate the Orshansky coefficient. This was likely related to the use of the equivalence scale to calculate household specific poverty lines rather than using it to compute equivalized household expenditure. This implies that both equivalised and per capita expenditure were used in the calculation of the poverty headcount. This approach used by Belize and Montserrat, would therefore not have been completely neutral as far as the headcount is concerned, since it led to this mixed use of both equivalised and per capita expenditure.

Another aspect of this calculation concerns the ranking of households/persons and their division into quintiles or deciles, both for reporting and analysis, and to define the reference population for computation of the Orshansky coefficient. In most Caribbean poverty studies, the quintiles and deciles are defined as equally sized groups of persons i.e. persons are ranked according to their adult equivalent household expenditure or per capita household expenditure. However, in some (mostly earlier) poverty studies, quintiles or deciles have been defined as equally sized groups of households. Given the way that household size tends

to be quite strongly related to expenditure (larger households tend to be in lower quintiles), this actually has quite a significant impact on the results. It is worth emphasizing that, in general, the fundamental unit of analysis should be the person, rather than the household, and so quintiles and deciles should be equally sized groups of persons.

A further complication is that the terms 'adult equivalent expenditure' and 'per capita expenditure' are sometimes used with a degree of ambiguity. For example, the term 'per capita consumption' may be used to refer to 'adult equivalent expenditure', on the grounds that, having been equivalized, adult equivalent expenditure is the average expenditure for one adult (or for equivalence scales based on calorific requirements which differ by sex, one adult male). However, per capita expenditure (total expenditure divided by household size) is fundamentally different to adult equivalized expenditure (or any other form of equivalised expenditure) which is calculated based on a non-equal weighting of household members reflecting assumptions about the relative costs of satisfying their basic needs.

Where equivalized expenditure is being used to measure poverty, a number of different scales have been used. Table 10 shows the different equivalence scales that have been used in Caribbean poverty studies or, alternatively, where per capita expenditure was used.

Table 10
Use of equivalization scales in poverty measurement

		Scale applied to household expenditure			Scale applied to household expenditure
Anguilla	2002	Per capita	Jamaica (continued)	2002	MoH calorie requirements[c]
	2008/09	CFNI calorie requirements[a]		2003	MoH calorie requirements[c]
				2004	MoH calorie requirements[c]
Antigua and Barbuda	2005	CFNI calorie requirements[a]		2005	MoH calorie requirements[c]
				2006	MoH calorie requirements[c]
Bahamas (The)	2001	Per capita		2007	MoH calorie requirements[c]
	2013	Per capita		2008	MoH calorie requirements[c]
				2009	MoH calorie requirements[c]
Barbados	1997	Per capita		2010	MoH calorie requirements[c]
	2010	Per capita		2012	MoH calorie requirements[c]
	2016/17	Per capita		2013	MoH calorie requirements[c]
				2014	MoH calorie requirements[c]
Belize	1996	Weights of 1, 0.5, 0.3[b]		2015	MoH calorie requirements[c]
	2002	CFNI calorie requirements[a]		2016	MoH calorie requirements[c]
	2009	CFNI calorie requirements[a]		2017	MoH calorie requirements[c]
	2018/19	..		2018	MoH calorie requirements[c]
				2019	MoH calorie requirements[c]
British Virgin Islands	2002	Per capita		2021	MoH calorie requirements[c]
				2023	MoH calorie requirements[c]
Cayman Islands	2007	CFNI calorie requirements[a]			
			Montserrat	2008/09	CFNI calorie requirements[a]
Dominica	2002	Per capita			
	2008/09	CFNI calorie requirements[a]	Saint Kitts and Nevis	2000	Per capita
				2007	CFNI calorie requirements[a]
Grenada	1998	Per capita			
	2007/08	CFNI calorie requirements[a]	Saint Lucia	1995	Per capita
	2018/19	CFNI calorie requirements[a]		2006	CFNI calorie requirements[a]
				2016	Weights of 1, 0.7, 0.5[d]
Guyana	1993	CFNI calorie requirements[a]			
	1999	CFNI calorie requirements[a]	Saint Vincent and the Grenadines	1996	Per capita
	2006	CFNI calorie requirements[a]		2008	CFNI calorie requirements[a]

		Scale applied to household expenditure			Scale applied to household expenditure
Jamaica	1990	MoH calorie requirements[c]	Suriname	2000	..
	1991	MoH calorie requirements[c]		2008	..
	1992	MoH calorie requirements[c]		2013/14	New Suriname Equiv. Scale[e]
	1993	MoH calorie requirements[c]		2016/17	New Suriname Equiv. Scale[e]
	1994	MoH calorie requirements[c]		2022	New Suriname Equiv. Scale[e]
	1995	MoH calorie requirements[c]			
	1996	MoH calorie requirements[c]	Trinidad and Tobago	1992	..
	1997	MoH calorie requirements[c]		1997/98	..
	1998	MoH calorie requirements[c]		2005	CFNI calorie requirements[a]
	1999	MoH calorie requirements[c]			
	2000	MoH calorie requirements[c]	Turks and Caicos Islands	1999	Per capita
	2001	MoH calorie requirements[c]		2012	CFNI calorie requirements[a]

Source: Authors' compilation.

[a] Calorific requirements recommended by the CFNI (Caribbean Food and Nutrition Institute). The weights are as follows: 0.270, 0.468, 0.606, 0.697, 0.825, 0.915,1,0.966 and 0.773 for males aged less than 1, 1-3, 4-6, 7-9, 10-14, 15-18,19-29,30-60 and 61+ and weights of 0.270, 0.436, 0.547. 0.614, 0.695, 0.737, 0.741, 0.727 and 0.618 for females in the same age categories.

[b] Weights of 1, 0.5 and 0.3 for adults aged 20 and over, persons aged 12-19 years, and children under 12 years respectively.

[c] Calorific requirements recommended by the Jamaica MoH (Ministry of Health) in consultation with the WHO/PAHO. The calorific requirement is 24% higher than that recommended by the CFNI (2,970 versus 2,400 Kcal). The weights for age and sex groups are very similar to those recommended by CFNI except that there is no distinction between the sexes of children.

[d] Weights of 1, 0.7 and 0.5 for persons aged 15 and over, persons aged 5-14 years, and children under 5 years, respectively.

[e] The NSES (New Suriname Equivalence Scale) is empirically determined and is not based on calorific requirements. It only distinguishes between two age categories (those aged 15 and over and those aged under 15, with no distinction drawn between males and females) and is intended to reflect economies of scale associated with larger households (Sobhie and Kisoensingh, 2023).

.. Not available.

Thirteen of 18 Caribbean countries used an equivalence scale based on relative calorific requirements in their most recent poverty study, three used per capita expenditure and two used other equivalence scales. Of the countries using relative calorific requirements, nearly all of them used the weights associated with CFNI recommended energy intakes by age and sex. Only Jamaica used different calorific requirements.

Recommended energy intakes provide an empirical basis for equivalizing expenditure on food, but there is no real justification for applying these scales to non-food expenditure, particularly as non-food consumption increases in proportion to food-consumption. Furthermore, calorific requirements for males are higher than for females, and so using them as an equivalence scale builds into the poverty measurement methodology a gender bias, specifically a presumption that the needs of men are greater than those of women. In contrast, other commonly used equivalence scales (e.g. the OECD scale) are gender neutral.

The two countries to use equivalence scales not based on calorific requirements were Saint Lucia and Suriname. In Saint Lucia's 2016 poverty assessment, household expenditure was equivalised using weights of 1 for persons 15 and over; 0.7 for children aged 5 to 14; and 0.5 for children aged under five. The desire for a gender-neutral method was cited as one of the main reasons for the adoption of this method. The Government of Suriname has an equivalence scale which has been used to produce estimates of poverty based on the 2013/14 HBS, and the 2016/17 and 2022 surveys of living conditions. The scale uses two age categories: persons aged 15 and over and those aged under 15, with no distinction drawn between males and females. This scale also reflects economies of scale associated with larger households (Sobhie and Kisoensingh, 2023). The new Suriname equivalence scale is the only equivalence scale in use among the countries considered in this study which accounts for economies of scale (e.g. that the resource requirements of a two adult household is assumed to be less than double that of a one adult household). The three countries that used per capita consumption in their most recent poverty assessments are Bahamas (2013), Barbados (2016/17) and British Virgin Islands (2002).

Table 11 shows national poverty rates and national poverty lines converted to US$ 2021 PPP. The majority of national poverty lines are expressed in terms of adult equivalent expenditure but some are expressed as per capita expenditure (those footnoted with a [b]). Poverty lines expressed in per capita expenditure will be lower than those expressed in adult equivalent expenditure because a per capita poverty line assumes the costs of meeting the basic needs of all persons is equal and there is no discounting of the needs of women and children. This is most noticeable in the countries such as Dominica, Grenada, Saint Kitts and Nevis, Saint Lucia and Saint Vincent and the Grenadines which carried out earlier surveys using per capita poverty lines and later surveys using adult equivalent expenditure. Poverty lines appeared to increase very significantly in these countries although a large part of this was due to the move from per capita to adult equivalent units. Welfare aggregates are always expressed in the same units as the poverty line but this is, nevertheless, another illustration of the impact that different methods of calculation can have.

Table 11
National poverty rates and national poverty lines (adult equivalent unless indicated, US$ 2021 PPP), 1990–2023

		Poverty rate (%)	Poverty line (US$ 2021 PPP)	Gini coefficient			Poverty rate (%)	Poverty line (US$ 2021 PPP)	Gini coefficient
Anguilla	2002	23.0	5 088[b]	0.31	Jamaica	2004	16.9	2 780	0.39
	2008/09	5.8	7 313	0.39	(continued)	2005	14.8	2 584	0.39
						2006	14.3	2 848	0.38
Antigua and Barbuda	2005	18.3	4 113	0.48		2007	9.9	2 825	0.37
						2008	12.3	2 883	0.38
Bahamas (The)	2001	9.3	3 624[b]	0.57		2009	16.5	2 756	0.38
	2013	12.5	4 094[b]	0.41		2010	17.6	2 729	0.39
						2012	19.9	2 686	0.40
Barbados	1997	13.9	5 527[b]	0.39		2013	24.6	2 609	0.41
	2010	19.3	4 669[b]	0.47		2014	20.0	..	0.38
	2016/17	25.7	3 550[b]	0.32		2015	21.2	2 574	0.38
						2016	17.1	..	0.35
Belize	1996	33.0	1 648	..		2017	19.3	..	0.38
	2002	33.5	2 990	0.40		2018	12.6	..	0.36
	2009	41.3	3 366	0.42		2019	11.0	..	0.37
	2018/19	52	7 487	0.49		2021	16.7		0.40
						2023	..	..	..
British Virgin Islands	2002	22.0	9 264[b]	0.23					
					Montserrat	2008/09	36.0	9 740	0.39
Cayman Islands	2007	1.9	4 267	0.40					
					Saint Kitts	2000	30.5	2 145[b]	0.39
Dominica	2002	39.0	2 621[b]	0.35		2007	23.7	3 467	0.38
	2008/09	28.8	4 187	0.44					
					Nevis	2000	32	2 516[b]	0.37
Grenada	1998	32.1	2 652[b]	0.45		2007	15.9	4 628	0.38
	2007/08	37.7	3 714	0.37					
	2018/19	25.0	3 715	0.40	Saint Lucia	1995	25.1	1 921[b]	0.50
						2006	28.8	3 948	0.42
Guyana	1993	43.0	2 092	0.44		2016	25.0	4.026	0.43
	1999	35.0	2 618	0.41					
	2006	36.1	2 746	0.35	Saint Vincent and the Grenadines	1996	37.5	1 396[b]	0.56
						2008	30.2	3 710	0.40
Jamaica	1990	28.4	..	0.38					
	1991	44.6	..	0.40	Suriname	2000[a]	44.2	..	0.47
	1992	33.9	..	0.39		2008[a]	51.3	..	0.44

		Poverty rate (%)	Poverty line (US$ 2021 PPP)	Gini coefficient			Poverty rate (%)	Poverty line (US$ 2021 PPP)	Gini coefficient
Jamaica	1993	24.4	3 239	0.36		2013/14	36.0	4 802	..
	1994	22.8	3.089	0.38		2016/17	20.3	3 009	0.44
	1995	27.5	3 139	0.36		2022	17.6	5 308	0.39
	1996	26.1	2 342	0.36					
	1997	19.9	2 826	0.39	Trinidad and Tobago	1992	21.2	2 638	0.42
	1998	15.9	2.067	0.37		1997/98	24.0	3 625	0.39
	1999	16.9	2 815	0.38		2005	16.7	4 476	0.39
	2000	18.7	2 786	0.40					
	2001	16.9	2 774	0.39	Turks and Caicos Islands	1999	25.9	3 427[b]	0.37
	2002	19.7	2 758	0.42		2012	21.6	6 285	0.36
	2003	19.1	2 835	0.39					

Source: Authors' compilation.
Note: The poverty lines shown here for Belize, Guyana and Jamaica are national averages.
[a] Urban areas only.
[b] Per capita expenditure instead of adult equivalent expenditure.
.. Not available.

Table 11 also shows national estimates of the Gini coefficient. The World Bank recently adopted a new threshold for defining high inequality countries, with a Gini coefficient of greater than 40 being used as the threshold. An analysis of recent data showed that 52 out of 169 countries were above this threshold and the importance of reducing inequality to poverty reduction was emphasized (Haddad et al., 2024). The authors also highlighted the need for more comparable data. This is highly relevant to Caribbean countries since, based on national estimates, Caribbean Gini coefficients are typically around this level, either just above or just below 40. Tackling inequality in the Caribbean, therefore, will be essential to achieving reductions in poverty.

III. Producing harmonized estimates of poverty for the Caribbean

The proceeding two chapters have illustrated how estimates of monetary poverty for Caribbean countries are far from being comparable across countries. The proceeding chapter also discussed how estimates from the same country are often not easily comparable over time because, with relatively infrequent surveys, new surveys often prompt a resetting of the poverty line, at the expense of comparability with earlier estimates. This chapter discusses the harmonization of Caribbean poverty statistics and presents some preliminary results from an analysis which is intended to represent a first step in this direction. This analysis is intended to provide some illustration of the impact that methodological differences can have on poverty estimates, particularly the definition of different poverty lines, and to facilitate discussion and further consideration of this issue. The estimates presented in this chapter should therefore be regarded as having experimental status.

There are several possible approaches to harmonizing Caribbean poverty statistics. One approach would be to seek to agree a common methodology between countries and for all countries to implement that methodology. As this study has shown, many Caribbean countries measure monetary poverty using the 'cost of basic needs' approach. They use household consumption as the welfare indicator and they use the indirect method to value the cost of non-food basic needs. However, as this study also shows, when it comes to how exactly this broad approach is applied, there are considerable variations in practice, for example in respect of the construction of the welfare aggregate, the methods used to calculate the food and non-food components of the poverty line, and the use (or not) of equivalization scales.

Perhaps most significant, both for the comparability of poverty estimates over time and for their comparability across countries, are the choices made by statistical offices about how and when to update their poverty lines. Poverty rates must be understood in the context of the poverty lines upon which they are based, and using a poverty line calculated for an earlier base year which has been updated only for inflation, is fundamentally different to using a poverty line which has been calculated only with reference to current circumstances. As discussed in the previous chapter, the 'cost of basic needs' approach to poverty measurement generally involves the use of a poverty line which is fixed, in real terms, to provide a consistent benchmark against which to measure poverty. This line is used until such time as it becomes outdated and needs to be recalibrated. When this happens will almost inevitably vary from country to country and will be determined by national considerations.

There has been considerable international coordination, cooperation and technical support in the production of Caribbean poverty statistics over the last three decades, and the commonality of practice which exists is evidence of this. This will continue to be important in building on and improving the availability and quality of poverty statistics. However, in itself, this is unlikely to lead to internationally comparable statistics. International organizations themselves do not all have the same priorities or use the same methods when it comes to poverty measurement. Bearing in mind the relatively subjective nature of poverty, the fact that it manifests itself in different ways in different countries, and the political sensitivity of poverty estimates, it is difficult to envisage harmonization coming about through a consensus among national producers of poverty statistics based on collaboration and good will alone. This situation is certainly not unique to the Caribbean. There is similar variation among national methods of poverty measurement in Latin America and many other regions of the world.

Furthermore, it is more useful to think of international harmonization as being a goal to which statisticians work towards but one which, due to the very different national realities, can never be fully achieved. However, the use of the same broad approach to poverty measurement across many Caribbean countries certainly serves as a good starting point and it is hoped that the comparative analysis of methods presented in this study contributes to continued dialogue and cooperation towards this goal.

In the absence of clear methodological consensus across countries, international comparisons must depend on the development of harmonized estimates at the international level. Two broad approaches suggest themselves. The first would be to seek to harmonize the consumption aggregates and then to use the international poverty lines (expressed in international dollars (PPP) per person per day) which are used by the World Bank and others for international comparisons both regionally and globally. This has the advantage that harmonized poverty estimates would not only be comparable with those from other Caribbean countries but would also be much more comparable with poverty estimates from other parts of the world.

A challenge with this approach is that it could be difficult to find a single international poverty line which is appropriate for all Caribbean countries, with their different income levels. Relative poverty lines, such as the World Bank's societal poverty line (described in more detail below) are not defined in terms of an absolute level of consumption and therefore can be applied more easily to countries of different income levels. This approach to poverty measurement, however, is conceptually quite different to that which has been used in the Latin America and Caribbean region and in most parts of the world, outside of the developed countries.

Another approach would be the creation of a consumption-based variant of the ECLAC methodology which could be applied to Caribbean SLC/HBS data. This approach would enable the production of poverty statistics that were based on a harmonized methodology as well as being tailored in an appropriate way to countries of different income levels, in line with the 'cost of basic needs' approach which has traditionally been used in the Caribbean. A disadvantage of this approach is the scale and complexity of the undertaking, seeking to replicate for the more irregular and infrequent surveys of the Caribbean a similar approach to that used by ECLAC to produce annual estimates of poverty for Latin America. This would involve not only the harmonization of the consumption aggregates, but also the creation and pricing of a large number of harmonized national food baskets (and for some countries sub-national food baskets); and application of a standard method for determining reference populations and the non-food component of the poverty line. All this would be a very substantial undertaking.

In addition to the harmonization of estimates, there is also the question of subregional aggregation and the possibility of a Caribbean poverty estimate. This does not necessarily require annual survey data in every country but it requires at least reasonably frequent surveys. The World Bank's Poverty and Inequality Platform (PIP) provides guidelines for the construction of regional aggregates. These include procedures for interpolation and extrapolation in the absence of data but also coverage rules which specify minimum data requirements for the production of regional aggregates. These coverage rules stipulate that data should cover

50 percent of the population in the region and that this can include surveys within three years either side of the reference year (World Bank, 2025a). At the present time, with the data gap that now exists for many countries, there is not sufficient survey data available to produce an estimate of poverty for the Caribbean. If it is possible to return to carrying out more frequent surveys, and crucially to maintain them with some consistency, it may be possible to meet these coverage rules. Whether this would produce a useful and reliable estimate is a question that would require further exploration.

In order to explore all these issues further, an experimental analysis of Caribbean poverty is presented here based on some first steps towards harmonization. National consumption aggregates were converted into consistent units, which for this analysis were US$ PPP 2021 per person per day i.e. consumption per capita in international dollars. There was no attempt to further harmonize the consumption aggregates, for example, for inclusion or exclusion of different components of food or non-food expenditure or to account for differences in the questions that may have been used in the survey instruments. These welfare aggregates were compared against two poverty lines.

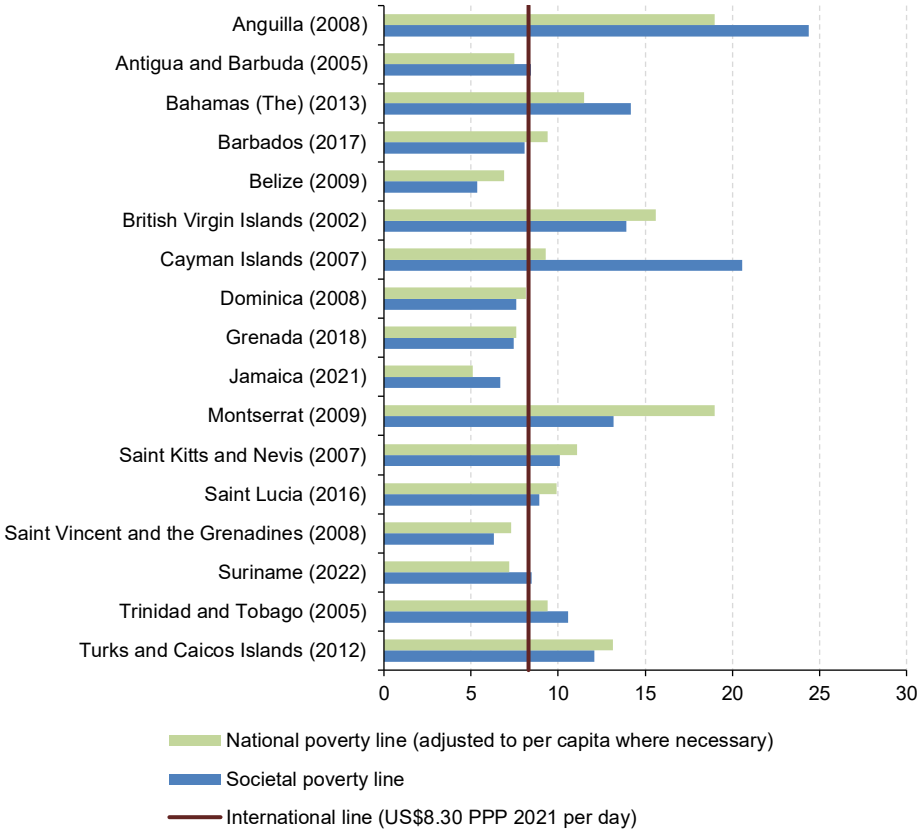
Firstly, they were compared against the World Bank's line of US$8.30 PPP 2021 which is derived as the median value of the national poverty lines of upper-middle income countries, and should therefore be most appropriate for the countries in this income grouping which, in the Caribbean, are Belize, Dominica, Grenada, Jamaica, Saint Lucia, Saint Vincent and the Grenadines and Suriname. The other Caribbean countries are high income countries (Montserrat and Anguilla are not classified but can be regarded as high income countries). For these countries, this international line is likely to be too low.

The second line utilized in this analysis was the so-called societal poverty line (SPL). The societal poverty line is defined as US$1.30 (PPP 2021) plus half the median level of consumption in a country (if this is lower than the international poverty line of US$3.00, then the SPL is set equal to the international poverty line). The SPL is made up of an absolute component (US$1.30) and a relative component (half median consumption). However, for levels of consumption typical of those seen in Caribbean countries, and particularly the high-income Caribbean countries, the relative component will tend to be large compared to the absolute component, and therefore the SPL behaves very much like a relative measure of poverty. For all Caribbean countries, the SPL is above the lower bound (the international poverty line of US$3.00). As mentioned above, relative poverty can be thought of as defining some minimum acceptable gap between the middle and the bottom of the distribution. The rationale for a relative conception of poverty is that it is one's position in one's own society, rather than in a regional or global income distribution, which determines whether someone is living in poverty.

Figure 1 illustrates three poverty lines calculated for each Caribbean country, for the year of the most recent available poverty survey, each expressed in US$ PPP 2021 per person per day. Those three lines are the national poverty line, the international line (US$8.30 PPP 2021) and the SPL. The international line of US$8.30 per day has, by definition, equal purchasing power in each country, and therefore takes the same value in each country, represented by the orange line. Both national poverty lines and the SPL reflect income levels in the respective countries, being lower than the international line in low-income countries, such as Belize, Jamaica and Saint Vincent and the Grenadines and higher in high-income countries, such as in Anguilla, Cayman Islands and Montserrat. Interestingly, the SPLs appear to be quite close to the national poverty lines in many countries (with a few exceptions). For ten countries the national line is higher than the SPL, but for seven countries the SPL is higher.

Poverty rates were estimated based on the international line (US$8.30 PPP 2021) and the SPL and compared to the existing national poverty rates. Table 12 shows these estimates for all survey years. In most cases, survey microdata was used to estimate these poverty rates although in some cases grouped data was used (either deciles or quintiles) where survey microdata was unavailable. Estimates computed from deciles are footnoted with a [d], while estimates calculated from quintiles are footnoted with a [c]. Figure 2 compares the three different poverty rates for the most recent survey year, in graphical form, for each country.

Figure 1
National poverty lines, the international line (US$8.30 PPP 2021) and societal poverty lines
(US$ PPP 2021 per person per day)



Source: Authors' compilation.
Note: The estimates of the SPL were calculated using wbpip (Fujs et al., 2025).

Table 12
Poverty rates based on national lines, the international line (US$8.30 PPP 2021) and societal poverty line, 1990–2023
(Percentages)

		National poverty rate	Poverty rate based on International line $8.30 2021 PPP[a]	Poverty rate based on SPL[b]
Anguilla	2002	23.0	18.0[c]	26.9[c]
	2008/2009	5.8	0[d]	16.5[d]
Antigua and Barbuda	2005	18.3	22.7	23.4
Bahamas (The)	2001	9.3	6.3[d]	20.4[d]
	2013	12.5	4.9[d]	20.0[d]
Barbados	1997	13.9	21.8	13.3
	2010	19.3	..	..
	2016/2017	25.7	19.3	18.2
Belize	1996	33.0	63.6	31.1
	2002	33.5	54.0	29.0
	2009	41.3	51.4[c]	28.7[c]
	2018/2019	52	..	..
British Virgin Islands	2002	22.0	5.6	15.0
Cayman Islands	2007	1.9	1.3	16.7
Dominica	2002	39.0	44,6[c]	30.3[c]
	2008/2009	28.8	29.4	23.5
Grenada	1998	32.1	37.5	28.5
	2007/2008	37.7	44.7	22.3
	2018/2019	25.0	..	..

		National poverty rate	Poverty rate based on International line $8.30 2021 PPP[a]	Poverty rate based on SPL[b]
Guyana	1993	43.0	..	..
	1999	35.0	..	..
	2006	36.1	..	..
Jamaica	1990	28.4	..	..
	1991	44.6	..	..
	1992	33.9	..	..
	1993	24.4	48.7	25.1
	1994	22.8	51.9	25.3
	1995	27.5	57.0	24.3
	1996	26.1	58.8	27.3
	1997	19.9	48.9	26.4
	1998	15.9	47.9	24.1
	1999	16.9	43.8	23.8
	2000	18.7	50.0	26.4
	2001	16.9	44.2	26.0
	2002	19.7	51.2	26.1
	2003	19.1	50.9	24.6
	2004	16.9	48.7	25.1
	2005	14.8	45.4	24.9
	2006	14.3	41.8	24.1
	2007	9.9	35.5	21.2
	2008	12.3	33.9	23.1
	2009	16.5	41.2	24.7
	2010	17.6	45.9	24.2
	2012	19.9	45.9	25.6
	2013	24.6	50.9	28.2
	2014	20.0	45.5	27.1
	2015	21.2	46.8	26.1
	2016	17.1	42.3	25.2
	2017	19.3	44.8	26.1
	2018	12.6	36.3	22.8
	2019	11.0	34.3	23.2
	2021	16.7	37.9	27.4
	2023	8.2	..	..
Montserrat	2008/2009	36.0	5.6[c]	15.6[c]
Saint Kitts and Nevis	2000	30.5	52.0	25.2
	2007	23.7	11.9[d]	19.4[d]
Saint Lucia	1995	25.1	51.5	28.2
	2006	28.8	29.9	22.1
	2016	25.0	17.0	20.1
Saint Vincent and the Grenadines	1996	37.5	67.4	37.7
	2008	30.2	38.8[d]	21.4[d]
Suriname	2000[e]	44.2	..	..
	2008[e]	51.3	..	..
	2013/2014	36.0	..	..
	2016/2017	20.3	23.5	20.8
	2022	17.6	21.9	22.2
Trinidad and Tobago	1992	21.2	..	..
	1997/2098	24.0	..	..
	2005	16.7	12.3	20.7
Turks and Caicos Islands	1999	25.9	20.6	26.3
	2012	21.6	6.9	18.2

Source: Authors' compilation.

Note: The estimates calculated using the international line (US$8.30) and the SPL were calculated using wbpip (Fujs et al., 2025).

[a] This poverty line of US$ 8.30 in 2021 PPPs is derived as the median value of national poverty lines of upper-middle income countries (Foster et al., 2025).

[b] The societal poverty line (SPL) is defined as $1.30 plus half the median level of consumption in a country, or the international poverty line if $1.30 plus half the median level of consumption is lower than the international poverty line (US$ PPP 2021) (Jolliffe et al., 2024; Foster et al., 2025).

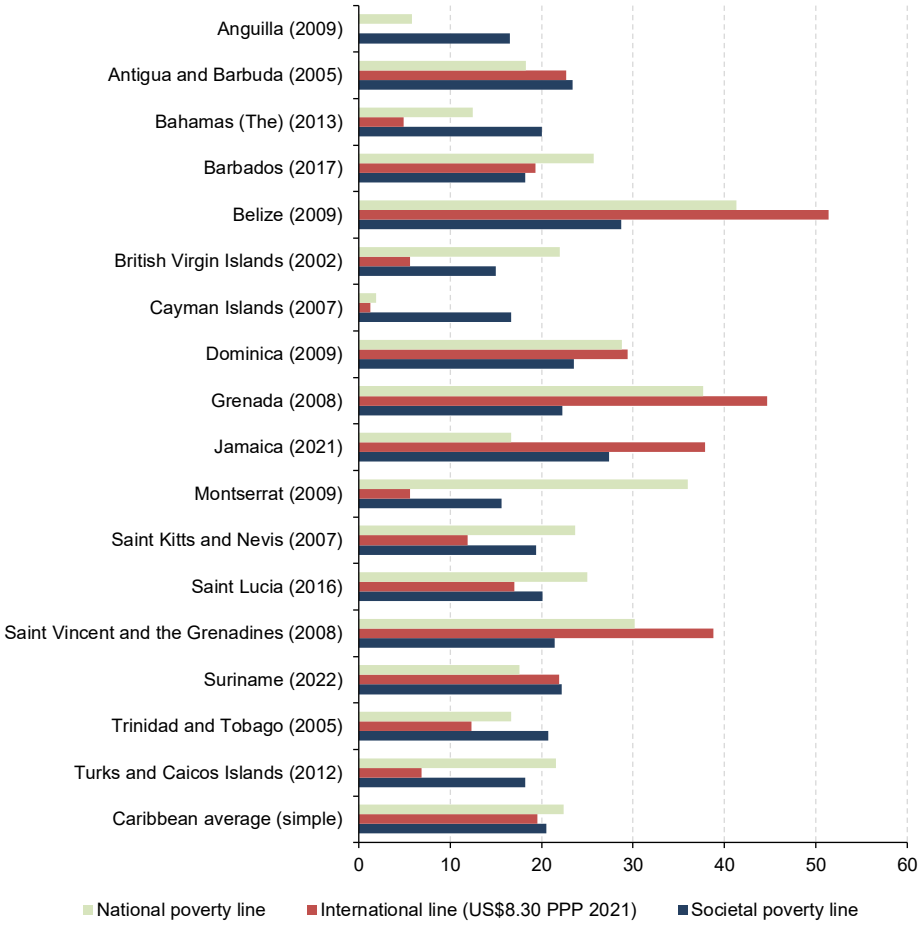
[c] Signifies that poverty rates were estimated from quintile means of household expenditure per capita.

[d] Signifies that poverty rates were estimated from decile means of household expenditure per capita.

[e] Urban areas only.

..Not available.

Figure 2
Poverty rate for most recent survey year based on national lines, the international line (US$8.30 PPP 2021) and SPL
(Percentages)



Source: Authors' compilation.
Note: The estimates calculated using the international line (US$8.30) and the SPL were calculated using wbpip (Fujs et al., 2025).

There are significant differences between the poverty rates estimated using all three of these lines, reflecting their different methodologies. For example, if the three different sets of poverty rates are used to rank countries, the ranking is significantly different for each of the three poverty measures. Using the international line (US$8.30 per day) compares all countries against the same fixed benchmark. This means that the lower income countries will generally have a large proportion of their population below the line and higher income countries will have a very small proportion of their population below the line. Those with a high proportion of their population falling below this line include Belize, Grenada, Jamaica and Saint Vincent and the Grenadines. In contrast, poverty rates based on this line are much lower (close to zero in some cases) in Anguilla, Bahamas, British Virgin Islands, Cayman Islands, Montserrat and Turks and Caicos Islands. This line of equal purchasing power produces poverty estimates which are very high in some countries and very low in others, ranging from 51% (Belize) to zero in Anguilla.

While this international line provides a useful benchmark for analysing levels of consumption and poverty, these statistics tend to suggest that a single international line cannot, by itself, provide a single set of estimates which provide a satisfactory picture of poverty across Caribbean countries of very different income levels. For example, a household that is just above this international poverty line in the Cayman Islands

might have an objectively higher level of consumption than a household that is just below the line in Jamaica, but that household in the Cayman Islands would be in just the 2nd percentile of their national consumption distribution and so would be more likely to think of themselves (or be perceived) as living in poverty, in comparison to the Jamaican household, just below the line, that would be in 4th decile in Jamaica. In countries like Antigua and Barbuda, Barbados and Suriname and numerous others with levels of consumption close to the Caribbean norm, US$8.30 could perhaps serve as a reasonable benchmark for measuring poverty. However, in the highest income countries, this threshold will be too low and, in these countries, US$8.30 is unlikely to be accepted as an appropriate poverty line.

Compared to the international line, the SPL is much more adaptive to the level of consumption in a country. Therefore, a high-income country can still have a high poverty rate, measured by the SPL, if there are a lot of households at the bottom of the consumption distribution that are a long way from the median. Based on these experimental estimates for the most recent survey years, poverty rates based on the SPL range from 12% (Saint Kitts and Nevis) to 29% (Belize), a much narrower range than for the international line (US$8.30). The average poverty rate based on the SPL for Caribbean countries is approximately 20, a level which is high by international standards, a finding which is not surprising given the high level of inequality in the subregion.

In general, the national poverty estimates tend to fall between those corresponding to the international line and the SPL, being more similar to those based on the SPL. This reflects the fact that national poverty lines consist of a food component, which is largely independent of a country's income level, and a non-food component which is much more dependent on income level (at least in terms of how the poverty line is set in a base year, through the calculation of higher Orshansky coefficients for higher income countries). For this reason, the national poverty estimates, like those based on the SPL, still register the presence of significant levels of poverty in high income countries where there is high inequality. The national poverty estimates are not as variable, from country to county, as those based on the international line but are more variable than those based on the SPL, ranging from above 40% in Belize to 2% in Cayman Islands.

For the highest income Caribbean territories, such as Bermuda and the Cayman Islands, the methodology which is applied to other Caribbean countries, based on the minimum cost food basket and the reciprocal of the food share of the bottom two quintiles may not be appropriate. No estimate is available for Bermuda, but the most recent estimate of the poverty headcount for the Cayman Islands was 1.9%. It is perhaps not surprising that having recorded such a low level of poverty in 2007, that no further poverty assessment was carried out. Yet that same 2007 poverty assessment recorded a Gini coefficient of 40 which is right at the World Bank's threshold for what are considered high inequality countries. Using the international line (US$8.30), the poverty rate would have been similarly low (1.3%), but using the SPL it would have been 16.7%. Earlier this year, the Government of Cayman Islands implemented a raise to the minimum wage and cited lifting people "out of poverty" as one of the key reasons for introducing the increase (Cayman News Service, 2025). Poverty can still be present in high income countries such as the Cayman Islands, but it takes a different form and methods that are appropriate for upper-middle income countries may not be appropriate for high income countries. For example, the Orshansky coefficient for the Cayman Islands in 2007 was 6, a level at which the non-food component accounts for 83% of the poverty line, making it difficult to justify the indirect method of calculating the non-food component.

Table 13 shows annual household consumption by decile and the considerable inequality which exists both within and between Caribbean countries. Within Caribbean countries, average consumption of the top decile is typically more than ten times that of the bottom decile. Comparing average consumption between countries, the average consumption of higher income Caribbean countries is around four times that in lower income countries. Combined, that translates to inequalities of fortyfold or more between the richest and poorest decile groups in the subregion.

Table 13
Annual household consumption per capita by decile
(US$ PPP 2021 per capita per year)

	Poorest	2nd	3rd	4th	5th	6th	7th	8th	9th	Richest	Mean
AIA 2002[a]	1 874	2 757	3 735	4 849	6 160	7 775	9 899	12 992	18 481	38 360	10 688
AIA 2008	6 797	8 630	10 620	12 845	15 422	18 546	22 588	28 377	38 421	71 577	23 382
ATG 2005	1 183	2 476	3 228	3 958	4 776	5 672	6 970	8 570	12 461	31 550	8 084
BHS 2001	2 645	4 251	5 495	6 765	8 157	9 769	11 762	14 482	19 007	42 713	12 504
BHS 2013	2 898	4 516	5 816	7 148	8 603	10 272	12 307	15 026	19 407	39 556	12 555
BLZ 1995	611	1 050	1 442	1 778	2 125	2 632	3 170	4 138	5 851	13 454	3 625
BLZ 2002	683	1 290	1 708	2 113	2 548	3 118	3 909	4 864	6 569	13 187	3 999
BLZ 2009[a]	1 003	1 398	1 801	2 227	2 699	3 249	3 940	4 909	6 587	13 599	4 141
BRB 1997	1 563	2 684	3 147	3 586	3 943	4 531	4 973	5 845	7 347	14 215	5 183
BRB 2010	..	..	..	..	..	..	..	..	..	..	..
BRB 2017	1 367	2 693	3 336	4 039	4 629	5 340	6 188	7 158	9 001	13 970	5 772
CYM 2007	4 654	7 195	9 090	10 898	12 950	15 697	19 109	23 617	32 732	59 632	19 558
DMA 2002[a]	926	1 399	1 899	2 444	3 062	3 800	4 743	6 085	8 433	17 694	5 048
DMA 2009	1 364	2 211	2 815	3 588	4 287	4 995	6 019	7 532	10 619	25 662	6 909
GRD 1998	478	1 318	2 087	2 844	3 488	4 338	5 322	6 795	9 055	18 650	5 438
GRD 2008	1 217	1 904	2 256	2 669	3 066	3 615	4 231	5 258	7 105	13 314	4 464
GRD 2018	..	..	..	..	..	..	..	..	..	..	..
JAM 1993	969	1 586	2 038	2 457	2 884	3 381	3 993	4 911	6 374	11 679	4 027
JAM 1994	1 014	1 525	1 905	2 288	2 701	3 220	3 910	4 843	6 272	12 450	4 013
JAM 1995	1 053	1 500	1 864	2 197	2 534	2 947	3 500	4 329	5 718	10 826	3 647
JAM 1996	941	1 424	1 734	2 073	2 455	2 888	3 325	3 965	5 215	10 189	3 421
JAM 1997	1 053	1 580	1 986	2 357	2 818	3 412	4 148	5 195	6 999	13 056	4 260
JAM 1998	1 075	1 663	2 073	2 466	2 900	3 401	4 042	4 930	6 503	12 557	4 161
JAM 1999	1 066	1 693	2 193	2 629	3 082	3 625	4 292	5 218	7 045	13 449	4 429
JAM 2000	1 071	1 599	1 940	2 331	2 750	3 297	3 953	4 868	6 490	13 385	4 168
JAM 2001	1 068	1 670	2 100	2 563	3 058	3 647	4 353	5 426	6 999	14 161	4 504
JAM 2002	948	1 525	1 910	2 291	2 729	3 260	3 949	4 959	6 735	14 918	4 322
JAM 2003	1 073	1 563	1 961	2 302	2 745	3 245	3 872	4 814	6 394	13 152	4 112
JAM 2004	1 075	1 649	2 019	2 419	2 858	3 398	4 046	4 996	6 641	13 326	4 243
JAM 2005	1 053	1 667	2 129	2 553	3 018	3 579	4 287	5 214	6 860	13 597	4 396
JAM 2006	1 210	1 772	2 241	2 750	3 188	3 732	4 416	5 344	7 154	13 779	4 559
JAM 2007	1 313	2 058	2 591	3 037	3 554	4 119	4 866	6 018	7 909	14 762	5 023
JAM 2008	1 322	2 024	2 560	3 081	3 661	4 317	5 176	6 381	8 357	15 465	5 234
JAM 2009	1 189	1 788	2 260	2 688	3 253	3 782	4 502	5 682	7 592	13 517	4 625
JAM 2010	1 112	1 714	2 122	2 506	2 995	3 532	4 153	5 260	7 061	13 770	4 422
JAM 2012	1 002	1 614	2 075	2 510	2 994	3 535	4 235	5 258	7 107	13 811	4 414
JAM 2013	824	1 389	1 818	2 246	2 743	3 274	3 976	4 964	6 503	12 759	4 050
JAM 2014	1 025	1 612	2 029	2 426	2 988	3 538	4 137	5 034	6 715	12 343	4 185
JAM 2015	1 031	1 573	2 019	2 490	2 943	3 480	4 061	4 953	6 724	12 680	4 195
JAM 2016	1 140	1 718	2 202	2 685	3 180	3 797	4 507	5 356	6 754	11 661	4 300
JAM 2017	1 103	1 658	2 084	2 570	3 040	3 567	4 234	5 190	6 883	12 264	4 259
JAM 2018	1 280	1 949	2 464	2 967	3 489	4 072	4 769	5 882	7 704	13 802	4 838
JAM 2019	1 263	1 999	2 523	3 071	3 640	4 229	5 009	6 144	8 186	14 568	5 063
JAM 2021	1 091	1 762	2 322	2 876	3 569	4 298	5 207	6 496	8 713	15 517	5 185
KNA 2000	1 005	1 479	1 915	2 302	2 680	3 240	3 919	4 993	6 426	12 359	4 032
KNA 2007	2 156	3 304	4 150	5 000	5 923	6 988	8 300	10 088	13 065	28 765	8 774
LCA 1995	749	1 396	1 823	2 203	2 688	3 274	4 247	5 602	7 466	16 982	4 643

	Poorest	2nd	3rd	4th	5th	6th	7th	8th	9th	Richest	Mean
LCA 2005	1 281	2 141	2 746	3 348	3 976	4 644	5 673	7 122	10 205	21 150	6 229
LCA 2016	1 671	2 796	3 615	4 337	5 225	6 037	7 390	9 102	12 364	29 686	8 222
MSR 2009	..	..	..	..	..	..	..	..	..	..	10 654
SUR 2017	1 618	2 499	3 153	3 880	4 506	5 252	6 322	7 742	10 095	18 501	6 357
SUR 2022	1 517	2 486	3 284	4 104	4 888	5 667	6 645	8 014	10 184	16 870	6 366
TCA 1999	1 576	2 662	3 452	4 408	5 591	6 774	8 578	11 365	15 603	43 268	10 328
TCA 2012	2 833	4 105	5 010	5 954	7 314	8 794	10 406	12 226	15 411	27 094	9 915
TTO 2005	2 032	3 282	4 253	5 196	6 213	7 417	8 908	10 979	14 327	28 003	9 061
VCT 1996	383	735	963	1 336	1 674	2 121	2 811	3 870	6 042	14 635	3 457
VCT 2008	1 502	2 028	2 450	2 889	3 379	3 956	4 684	5 703	7 458	18 120	5 217
VGB 2002	3 190	4 947	5 952	7 401	8 463	10 140	11 595	14 103	17 596	31 732	11 512

Source: Authors' compilation.

Note: The estimates were calculated using wbpip (Fujs et al., 2025). Data are shown for the following 17 countries: Anguilla (AIA); Antigua and Barbuda (ATG); Bahamas (BHS); Barbados (BRB); Belize (BLZ); British Virgin Islands (VGB); Cayman Islands (CYM); Dominica (DMA); Grenada (GRD); Jamaica (JAM); Montserrat (MSR); Saint Kitts and Nevis (KNA); Saint Lucia (LCA); Saint Vincent and the Grenadines (VCT); Suriname (SUR); Trinidad and Tobago (TTO); and Turks and Caicos Islands (TCA).

[a] Signifies that decile means were estimated from quintile means of household expenditure per capita.

IV. Conclusions and recommendations

The differences between methods of poverty measurement described in this report prevent reliable cross-country analysis of Caribbean poverty on the basis of national estimates. Producing such analyses requires harmonizing welfare aggregates at an international level and using consistently defined poverty lines. Due to the different information available in national surveys, full harmonization may not be possible but estimates should be harmonized as far as possible. This process will highlight where differences lie in national methodologies and this information should be used to inform the further development and refinement of national methodologies. As a contribution towards this process and based on the comparative analysis of methods presented above, this study concludes with the following recommendations for producers of official estimates of household consumption for welfare analysis:

(i) **Adopt common reference period benchmarks**: Establish standardized recall durations guided by expenditure frequency: seven to fourteen days for food, one month for regular services, three months for semi-regular purchases, and twelve months for infrequent or seasonal items such as education, insurance, and durables.

(ii) **Ensure consistent valuation of non-monetary consumption**: Require that home-produced and in-kind goods be valued using local market prices and that all surveys include imputed rent for owner-occupied dwellings, either through direct self-assessment or model-based estimation.

(iii) **Improve the treatment of durable goods**: Replace the practice of reporting full purchase costs with that of estimating the annualized use value of durables, in line with international welfare measurement standards.

(iv) **Clarify and expand coverage of service-based expenditures**: Explicitly include childcare, elderly care, and other personal or household services to better capture the full composition of household consumption in modern Caribbean economies.

(v) **Collaborate regionally to develop a Caribbean harmonization protocol**: Develop a Caribbean harmonization protocol for household expenditure surveys and document recall, valuation, and coverage practices in future methodological reports.

Furthermore, the following observations are made for consideration of relevant authorities and stakeholders to enhance poverty measurement in the Caribbean:

(i) Poverty lines should represent the same volume of consumption over time (i.e. adjusted for inflation) but also need to be recalibrated periodically to ensure that poverty lines remain relevant (i.e. adjusted to reflect longer term economic and social changes). When poverty lines do need to be recalibrated, comparable estimates for earlier survey years should be produced to provide users with a clear idea of how poverty is changing over time. This would involve recalculating poverty estimates for earlier years based on the new poverty line, taking appropriate account of price changes.

(ii) The use of calorific requirements to equivalize non-food expenditure should be reconsidered. This becomes more difficult to justify as the non-food share of expenditure increases, particularly the application of gender differentials based on calorific requirements to non-food consumption, which introduce a gender bias into the methodology. Consideration should be given to alternatives which could include the use of other equivalence scales, application of different scales to food and non-food consumption, or the use of per capita consumption.

(iii) The approach commonly used to construct the food basket in the Caribbean is rather different to that used in many other parts of the world, particularly the use of an algorithm to estimate the minimum cost food basket which is consistent with nutritional requirements, rather than utilising consumption patterns observed in a reference population. An analysis of the relative merits of these two different approaches would be very useful to validate (or otherwise) the Caribbean approach.

(iv) Countries using the bottom two quintiles to estimate the Orshansky coefficient could consider using a more narrowly defined reference population, since the use of the bottom two quintiles (i.e. fully 40% of the population) appears to be relatively wide by international standards. The reference population is intended to consist of households close to the poverty line. However, an important caveat to this recommendation is that the small size of survey samples in the Caribbean may be a factor that would justify the use of a more widely defined reference population.

(v) Some (mostly earlier) poverty surveys calculated the non-food component of the poverty line as the expenditure per capita on non-food items among the bottom two quintiles of the population. This is not recommended. The indirect method of calculating the non-food component is preferable (multiplying the extreme poverty line by the reciprocal of the food share of an appropriate reference population).

(vi) Some (mostly earlier) poverty surveys used rankings of households rather than persons to calculate decile and quintile group means and other statistics. The fundamental unit of analysis should be the person rather than the household and therefore quintiles, deciles, poverty rates, Gini coefficients and other statistics should all be calculated for persons rather than households (at least if there is a reason for calculating, for example, a household poverty rate, then the basis of calculation should be made clear).

(vii) Poverty statistics can be politically sensitive; therefore, the preparation, finalization and quality assurance of poverty estimates should be carried out by statisticians or other experts under conditions of strict confidentiality and independent of political pressures. Arrangements for pre-release access and publication should follow agreed protocols. Having followed international best practices in the production of poverty statistics, if poverty estimates are criticised, statisticians need to be prepared to provide transparent briefing on the process and outcome to preserve confidence in official statistics.

(viii) In most cases, SLC/HBS survey and poverty assessment reports provide detailed analyses and good information about survey methods and methods of poverty measurement. This

transparency with respect to methods is essential for international harmonization. It also facilitates dialogue, peer review and statistical cooperation which all contribute to the ongoing development and refinement of national poverty estimates. Data producers are encouraged to continue providing comprehensive survey and poverty assessment reports.

(ix) This study was made possible by national statistical offices providing access to survey microdata for research purposes. Statistical offices can significantly expand the use and analysis of their survey data by providing access to microdata to bona fide researchers, and all statistical offices should have protocols for microdata access.

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Annex A1

Additional tables on the measurement of consumption (see chapter 1)

Table A1.1
Questionnaires reviewed by country and main characteristics

Country	Survey type	Reference year(s)	Questionnaire structure	Sample size	Diary used and reference period
Antigua and Barbuda	Survey of Living Conditions and Household Budgets (SLC-HBS)	2005–2006	Separate household and individual questionnaires	1,066 households (≈ 5 % of households) – 86 % response rate	Yes – two 7-day diaries. Questionnaire applied 1-, 3- and 12-month recall periods by expenditure frequency.
Barbados	Survey of Living Conditions (SLC)	2016	Integrated household and individual questionnaires	2,508 households (2,362 usable after cleaning)	No diary. Questionnaire applied 1-, 3- and 12-month recall periods.
Belize	Household Expenditure Survey (HES)	2008–2009	Integrated household and individual questionnaires	1,560 households (≈ 2 % of households)	Yes – two 7-day diaries (household and individual). Questionnaire applied 1-, 3- and 12-month recall periods.
Cayman Islands	Survey of Living Conditions and Household Budgets (SLC-HBS)	2006–2007	Integrated household and individual questionnaires	1,144 households (≈ 6 % of population)	Yes – one 14-day diary. Questionnaire applied 1-, 3- and 12-month recall periods.
Dominica	Survey of Living Conditions and Household Budgets (SLC-HBS)	2008–2009	Integrated household and individual questionnaires	877 households (≈ 4 % of households)	Yes – two 7-day diaries. Questionnaire applied 1-, 3- and 12-month recall periods.
Jamaica	Survey of Living Conditions (JSLC)	2021	Integrated household and individual questionnaires	2,187 households (6,215 persons)	No diary. Questionnaire applied 1-, 3- and 12-month recall periods.
Saint Kitts and Nevis	Survey of Living Conditions and Household Budgets (SLC-HBS)	2007–2008	Separate household and individual questionnaires	958 households (≈ 6 % of population)	Yes – two 7-day diaries. Questionnaire applied 1-, 3- and 12-month recall periods.
Saint Lucia	Survey of Living Conditions and Household Budgets (SLC-HBS)	2015–2016 (fieldwork Nov 2015–Aug 2016)	Integrated household and individual questionnaires	1,504 households (≈ 80 % response)	Yes – one 7-day diary. Questionnaire applied 1-, 3- and 12-month recall periods.
Suriname	Survey of Living Conditions (SLC)	2016–2017 (fieldwork Oct 2016–Sept 2017)	Integrated household and individual questionnaires	2,033 households nationwide	No diary. Questionnaire applied 7-, 30-, 90- and 365-day recall periods by item type.
Trinidad and Tobago	Survey of Living Conditions (SLC)	2014	Separate household and individual questionnaires	≈ 4,000 households (≈ 1.5 % of households)	Yes – one 14-day diary. Questionnaire applied 1-, 3- and 12-month recall periods.

Source: Information compiled from national statistical offices and poverty assessment documentation including, Antigua and Barbuda (2005–2006 SLC-HBS Methodology Report); Barbados (2016 SLC Methodological Report, BSS); Belize (HES 2008/09 and Country Poverty Assessment 2009 Final Report); Cayman Islands (SLC Main Report Vol. I 2007, Economics and Statistics Office); Dominica (Country Poverty Assessment 2009 Vol. I and Appendices); Jamaica (2021 Survey of Living Conditions, PIOJ/STATIN); Saint Kitts and Nevis (Country Poverty Assessment 2007/08 Vol. I, Kairi Consultants Ltd.); Saint Lucia (SLC-HBS 2015–2016 Report and IHSN Metadata, Central Statistical Office of Saint Lucia); Suriname (SLC 2016–2017 Methodological Report, IDB); Trinidad and Tobago (SLC 2014 Questionnaire and Kairi Consultants Documentation).

Table A1.2
Harmonized COICOP-based Framework

Harmonization Component	Category	Subcategory	COICOP Reference	Description (COICOP 2018)
Food	Food and Beverage	Food (purchased)	01.1	All food and non-alcoholic beverages purchased for household consumption: cereals, meat, fish, vegetables, oils, condiments, etc.
		Food (homegrown)	01.1.9	Food produced and consumed by the household, valued at farm-gate or local market price.
		Food (in-kind)	01.1.9	Food received as payment, gifts, or aid, valued at market equivalent.
		Meals away from home	11.1.1	Meals, snacks, and drinks prepared outside the home and consumed on or off premises (restaurants, canteens, fast food).
		School meals	11.1.1	Meals provided through schools or educational programmes.
Non-food (non-durables)	Alcohol and tobacco	Alcohol	02.1	Alcoholic beverages for household use: beer, wine, spirits.
		Tobacco	02.2	Cigarettes, cigars, pipe tobacco, and other tobacco products.
	Clothing and footwear	Clothing	03.1	Garments for men, women, children, and infants, including suits, dresses, shirts, trousers, coats, underwear, and accessories such as belts and gloves. Includes materials for tailoring and making clothes.
		Footwear	03.2	All types of footwear for men, women, and children, including sports shoes and related accessories.
		Minor repairs/ maintenance	03.1, 03.2	Repair, mending, and alteration services for clothing and footwear, including tailoring, resizing, and shoe repairs.
	Housing, water, electricity, gas & other fuels	Utilities	04.4	Regular payments for water, sewage, refuse, electricity, gas, and other fuels.
		Repairs (minor)	04.3	Routine maintenance of dwellings: painting, small plumbing, carpentry.
	Household operations	Domestic staff	05.6	Wages or fees paid to household employees, cleaners, gardeners, drivers.
		Childcare	13.3	Paid care or supervision services for children.
		Elderly care	13.3	Paid services for elderly or dependent adults, home-based or institutional.
		Household supplies	05.6	Cleaning agents, detergents, disinfectants, insecticides, and paper products.
	Health	Outpatient services	06.2	Consultations and treatments by doctors, dentists, and other health professionals.
		Hospitalization	06.3	Services provided by hospitals and inpatient institutions.
		Medicines / medical supplies	06.1	Prescribed and over-the-counter medicines, medical products, and equipment.
		Health insurance (service component)	06.4	Payments for health-related insurance coverage.
	Education	Tuition	10.1–10.5	Fees paid to educational institutions at all levels.
		Books	10.1–10.5	Textbooks and learning materials.

Harmonization Component	Category	Subcategory	COICOP Reference	Description (COICOP 2018)
		Uniforms	03.2	Required clothing for school attendance.
		Transportation (school)	07.3	Transport services for commuting to and from school.
		Lessons	10.5	Private tuition and extracurricular lessons.
		Boarding and lodging	11.2	Accommodation and meals provided by educational institutions.
	Transportation (operational costs only)	Public transport	07.3	Passenger transport by bus, train, taxi, or air.
		Fuel	07.2	Fuels and lubricants for private vehicles.
		Maintenance / repairs	07.2	Maintenance and repair of personal transport equipment.
		Vehicle insurance	12.1	Payments for motor-vehicle insurance.
	Information and communication (services only)	Telephone (mobile and landline)	08.2	Telephone and telecommunication services.
		Internet and data	08.2	Internet access and data subscription services.
		Digital subscriptions / software	08.2 / 09.4	Fees for digital content, software, or streaming services.
		Postage	08.2	Postal and courier services.
	Recreation, sport and culture (non-durable)	Goods	09.2	Recreational and cultural non-durable goods: games, toys, hobby materials.
		Services	09.3 / 09.5	Participation fees for recreation, cultural, and sporting activities.
		Subscriptions / printed media	09.4	Newspapers, magazines, books, and periodicals.
		Leisure travel	09.7	Package holidays and local leisure travel.
	Personal care, social protection & other services	Personal care	13.1	Hairdressing, cosmetics, hygiene products, and other personal care services.
		Social participation / ceremonies	13.4	Expenditure on social events, contributions, or ceremonies.
	Financial and insurance services	Insurance services	12.1	Non-life and life insurance premiums.
		Financial services fees	12.2	Bank charges and financial intermediation costs.
Durables	Furnishings & equipment	Major appliances and furnishings	05.1–05.3	Large durable household goods: refrigerators, washing machines, furniture.
		Minor appliances and furnishings	05.1–05.3	Smaller household appliances and furnishings with long useful life.
		Small tools and household textiles	05.5	Tools, household textiles, and small durable implements.
		Minor repairs and maintenance	05.5.2	Repair of furniture, furnishings, and floor coverings, including reupholstering, polishing, and restoration work. Excludes repairs of household appliances and major equipment.
	Transportation	Vehicle purchase	07.1	Purchase of motor vehicles (cars, motorcycles, etc.).
	Information and communication	Durable ICT goods (computers, televisions, etc.)	08.1	Computers, televisions, and other durable communication devices.
	Recreation, sport and culture	Recreation durables / musical instruments	09.1 / 09.4	Durable leisure equipment, cameras, and musical instruments.

Harmonization Component	Category	Subcategory	COICOP Reference	Description (COICOP 2018)
Housing	Housing services	Rent	04.1	Actual rentals paid for dwellings, including fittings and maintenance services.
		Imputed rent	04.2	Estimated rental value of owner-occupied or rent-free dwellings.

Source: Authors' compilation from Saavedra, Sanchez and Olivieri (2025), *Constructing Harmonized Consumption-based Welfare Aggregates for Poverty and Inequality Analysis in Caribbean Countries* and United Nations (2018), Classification of Individual Consumption According to Purpose (COICOP) 2018.
Note: The harmonized framework consolidates the 13 COICOP divisions into four analytical components, Food, Non-food (non-durables), Durables, and Housing; following international best practices in welfare measurement. Categories and subcategories are drawn from the harmonized framework developed for the World Bank's Caribbean consumption-based welfare study. Descriptions are adapted from the *COICOP 2018* definitions of expenditure divisions and groups. Food consumed away from home, including school meals, is included under the food component, consistent with COICOP 11.1.1.

Table A1.3
Valuation of consumption practices by domain and country

Country	Housing (imputed rent)	Food (home-produced)	Food (in-kind/gifts)	Durables
Antigua and Barbuda	Collected through self-assessed rental value for owner-occupiers.	Valued at respondent's estimated market price.	Not collected separately.	Recorded at full purchase cost.
Barbados	Only actual rent recorded, no imputed rent for owner-occupiers.	Collected in quantities only or limited to production for sale.	Quantities recorded but no value assigned.	Recorded at full purchase cost.
Belize	Estimated rent for owner-occupiers collected.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.
Dominica	Estimated rent for owner-occupiers collected.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.
Cayman Islands	Estimated rent for owner-occupiers collected.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.
Jamaica	Only actual rent recorded, no imputed rent for owner-occupiers.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.
Saint Kitts and Nevis	Estimated rent for owner-occupiers collected.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.
Saint Lucia	Estimated rent for owner-occupiers collected.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.
Suriname	Estimated rent for owner-occupiers collected.	Valued using quantity and market price.	Valued using quantity and market price.	Recorded at full purchase cost, annualized to 12 months using coefficient.
Trinidad and Tobago	Estimated rent for owner-occupiers collected.	Valued at respondent's estimated market price.	Valued at respondent's estimated market price.	Recorded at full purchase cost.

Source: Authors' compilation based on national SLC/HBS/HES questionnaires and methodological reports, including Suriname SLC 2016–2017 Methodological Report (IDB, 2018).
Note: The table summarizes valuation approaches across ten Caribbean household surveys conducted between 2005 and 2021. Imputed rent is the estimated market rental value for owner-occupied or rent-free dwellings. The annualization coefficient used in the Suriname SLC (2016–2017) converts expenditures reported for shorter or longer recall periods (e.g., weekly, quarterly) to a 12-month equivalent. It does not estimate depreciation or use-value.

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